

DOCUMENT RESUME

ED 421 064

HE 031 408

TITLE National Student Loan Data System. Participant's Guide.
INSTITUTION Office of Postsecondary Education, Washington DC. Student
Financial Assistance Programs.
PUB DATE 1998-06-00
NOTE 196p.
PUB TYPE Guides - Classroom - Learner (051)
EDRS PRICE MF01/PC08 Plus Postage.
DESCRIPTORS College Administration; Compliance (Legal); *Computer
Software; *Databases; Eligibility; Higher Education;
*Recordkeeping; Student Financial Aid; *Student Loan
Programs; Workshops
IDENTIFIERS Higher Education Act Title IV; *National Student Loan Data
System

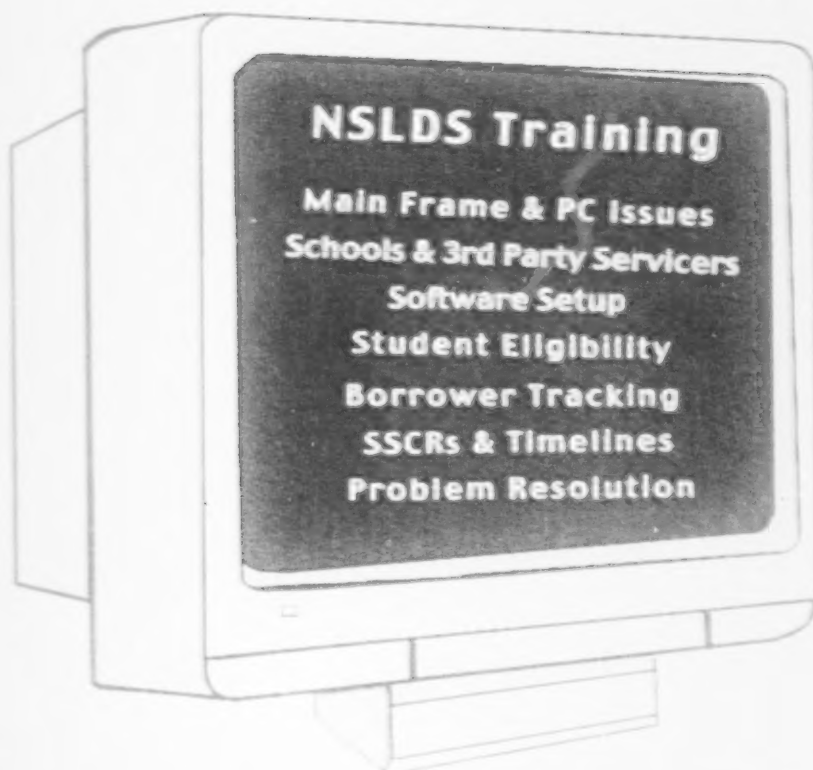
ABSTRACT

This guide provides the materials necessary for a two-day 10-session workshop on the National Student Loan Data System (NSLDS) and is intended for appropriate personnel at institutions of higher education. Main objectives for participants in the workshop include being able to, first, explain how NSLDS works; second, navigate through the NSLDS function screens effectively; and, third, use NSLDS to comply with Title IV student financial aid requirements. The 10 sessions cover the following topics: (1) overview of NSLDS and its functions, (2) timelines, (3) problem resolution, (4) connecting to NSLDS, (5) school and third-party servicer responsibilities, (6) software setup, (7) student eligibility, (8) borrower tracking, (9) student status confirmation reports, and (10) wrap-up. Provided for each session are: a list of session objectives, a list of session contents, and the session material, displayed in half pages to allow space for note-taking during the presentation. (DB)

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National Student Loan Data System Participant's Guide

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Student Financial Assistance Programs

June 1998



Introductory Session

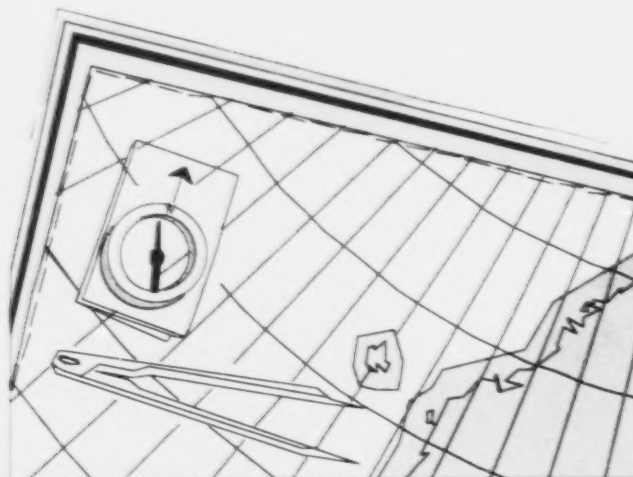
Objectives

After completing the workshop, you will be able to:

- ◆ explain how NSLDS works,
- ◆ navigate through the NSLDS function screens effectively, and
- ◆ use NSLDS to comply with Title IV student financial aid requirements.

Contents

- ◆ Overview of the Workshop
- ◆ Main Workshop Objectives
- ◆ Workshop Agenda
- ◆ Workshop Materials
- ◆ Recommendations



OVERVIEW OF THE WORKSHOP

Notes:



NSLDS Information

- NSLDS has data on:
 - FFEL Program
 - Direct Loan Program
 - Perkins Loan Program
 - Pell Grant awards and disbursements
 - Pell Grant, FSEOG, and Perkins Loan overpayments

MAIN WORKSHOP OBJECTIVES

- ◆ Explain how NSLDS works.
- ◆ Navigate through the NSLDS function screens effectively.
- ◆ Use NSLDS to comply with Title IV student financial aid requirements.

In addition:

- ◆ Participate actively.
- ◆ Be on time.

WORKSHOP AGENDA

Day 1

Introductory Session

Session 1: Overview of NSLDS and its Functions

Session 2: Timelines

Session 3: Problem Resolution

Session 4: Connecting to NSLDS

Session 5: School and Third-Party Servicer Responsibilities

Day 2

Session 6: Software Setup

Session 7: Student Eligibility

Session 8: Borrower Tracking

Session 9: Student Status Confirmation Reports

Session 10: Wrap Up

WORKSHOP MATERIALS

- ◆ Participant's Guide.
- ◆ NSLDS *Quick Reference Guide*.

Notes:



RECOMMENDATIONS

- ◆ Provide written feedback on NSLDS.
 - See recommendations sheet on next two pages.
 - Fill this out as we go along.

NSLDS RECOMMENDATIONS SHEET

Help ED improve NSLDS. Please use this sheet to write down your ideas and suggestions as you think of them.

Here are the suggestions that occurred to me during:

Session 1

Session 2

Session 3

Session 4

NSLDS RECOMMENDATIONS SHEET (CONT'D)

Session 5

Session 6

Session 7

Session 8

Session 9



Overview of NSLDS and its Functions

Objectives

After completing this session, you will be able to:

- ◆ describe the online functions of the National Student Loan Data System (NSLDS),
- ◆ explain how the eligibility of Title IV applicants is determined using the prescreening/postscreening process,
- ◆ describe Financial Aid Transcripts in NSLDS,
- ◆ explain how the borrower's enrollment status is monitored using Student Status Confirmation Reports,
- ◆ describe how defaulted borrowers are tracked, and
- ◆ explain how NSLDS searches for data.

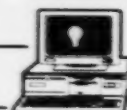
Contents

- ◆ Introduction
- ◆ Data Providers
- ◆ Determining Eligibility
- ◆ Enrollment Tracking
- ◆ Borrower Tracking



INTRODUCTION

Notes:



NSLDS Statistics

- Over 100 million loans (FFEL, Direct, Perkins)
- Over 18 million Pell Grants
- Over 17,000 schools
- Over 29,000 school branches
- Over 30,000 lenders
- 66 guaranty agencies (36 active)

NSLDS Goals

- Improve student-aid-data quality and accessibility
- Reduce administrative burden
- Minimize fraud and abuse

Online Functions of NSLDS

- Online functions include:
 - Financial Aid Transcripts (FATs)
 - Student Status Confirmation Reports (SSCRs)
 - Overpayment reporting
 - Borrower tracking
 - Online contact

DATA PROVIDERS

Notes:

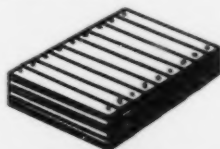


ED's Internal Data Sources

- Central Processing System (CPS)
- ED's Debt Collection Service
- Postsecondary Education Participant System (PEPS)
- Federal Direct Loan Program
- Federal Pell Grant Recipient Financial Management System (PGRFMS)

ED's External Data Sources

- Guaranty agencies
- Schools (or their third-party servicers)
- Lenders (or their servicers)



DETERMINING ELIGIBILITY

Prescreening

Prescreening provides schools with data on students who are previous financial aid recipients.

Prescreening

- Prescreening identifies individuals who have:
 - defaults on Title IV loans
 - overpayments on Pell Grants, FSEOGs, and Perkins Loans
 - approached loan eligibility for a single year

Postscreening

Postscreening identifies students whose status has changed.

Postscreening

NSLDS will scan its database to find cases where a student's status changes because of:

- defaulted loans
- satisfactory loan repayment arrangements
- overpayments

Notes:



Financial Aid Transcripts

NSLDS's online Financial Aid Transcript (FAT) function provides another way to obtain the historical information needed to determine a student's eligibility prior to disbursing financial aid.

Notes:



RC05 — FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
Financial Aid Transcript Summary Part 1 12:15:50

SSN..001285951 First Name..IDA DOB..10-02-1937 Schl Yr..1998
Curr SSN: 001285951 Last Name: BENNINGTON Name Hist: Y
For Overpayment Summary Info make a selection (S) and press ENTER
Sel Overpayment Contact Defaulted Loans..... Y Discharged..... Y
 Pell..... N N/A Loan Sat. Repayment: N Active Bankruptcy: N
 FSEOG.... N N/A
 Perkins.. Y 05 Perkins Cumulative Loan Amount... \$2,500

For Aggregate Detail make a selection (S) and press ENTER

Aggregate Amount for FFELP/Direct Loans

- Subsidized Loans			
Outstanding Prin. Bal.:	\$ 5,000	Pending Disb: \$	N/A Total: \$ 5,000
- Unsubsidized Loans			
Outstanding Prin. Bal.:	\$ 3,000	Pending Disb: \$	N/A Total: \$ 3,000
- Consolidated Loans			
Outstanding Prin. Bal.:	\$ 8,000		Total: \$ 8,000

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

RC05 Financial Aid Transcript Summary Part 1

RC5A	Loan Detail(LD)	Name History(NH)	Attendance History(AH)
NSLDS		03-02-1998	
Financial Aid Transcript Summary Part 2		12:15:52	
SSN.....: 001285951	First Name: IDA	DOB: 10-02-1937	Schl Yr...: 1998
Curr SSN: 043906703	Last Name.: BENNINGTON	Name Hist: Y	
Perkins Loans			
Cumulative Loan Amount.....: \$2,500		Current Year Loan Amount: \$ N/A	
First Disb. Prior to 10-01-1992: N		Expanded Lending Option.: N	
1994-95 Pell Payment Data			MORE: +
School Code: 00156200		School Name: DEKALB COLG	
Tran.....: 01	Sch. Amt....: \$ 1,200	Disb. Amt.: \$ 600	
Rem. Amt.:	% Sch. Used: 100.00	As of.....: 10-10-1996	
School Code: 00256900		School Name: UNIV OF NEVADA LAS VEGAS	
Tran.....: 01	Sch. Amt....: \$ 1,200	Disb. Amt.: \$ 600	
Rem. Amt.: \$	% Sch. Used: 100.00	As of.....: 10-10-1996	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD			

RC5A Financial Aid Transcript Summary Part 2

RC06	GA/School Information (GS)
NSLDS	
03-02-1998	
Loan Detail By Loan Begin Date, Outstanding Bal. (Descending)	
12:15:54	
SSN.....: 043906703	First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
Curr SSN: 043906703	Last Name.: NUNEZ
MORE: +	
Loan Detail	Loan Amount Loan Begin Loan End GA Code School Code --Contact--- Code Type
- FFEL STAFFORD SUB	\$5,500 09-03-1996 05-22-1997 733 0258900 700204 LNS
Status Cd ID as of 09-03-1996	Outst Bal. \$2,750 as of 08-13-1996 Acad Lvl: 3
- FFEL STAFFORD SUB	\$5,500 08-29-1995 05-16-1996 733 0258900 827288 LEN
Status Cd ID as of 08-29-1995	Outst Bal. \$5,500 as of 09-30-1995 Acad Lvl: 3
- FFEL STAFFORD SUB	\$1,750 01-18-1995 05-18-1995 733 00258900 700043 LNS
Status Cd ID as of 01-18-1995	Outst Bal. \$1,750 as of 06-30-1996 Acad Lvl: 2
- FFEL STAFFORD SUB	\$1,750 09-05-1994 05-13-1995 733 00257200 700043 LNS
Status Cd ID as of 09-05-1994	Outst Bal. \$1,750 as of 06-30-1996 Acad Lvl: 2
PRIVACY ACT OF 1974 (AS AMENDED)	
F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER	

RC06 Loan Detail 14

Financial Aid Transcripts

■ FATs provide details about the following data:

- any defaults on Title IV loans
- any overpayments on Title IV aid programs
- the amount of aid for a single year (or cumulative aid)

Notes:



Overpayments

Overpayments on a Pell Grant, FSEOG, or a Perkins Loan are reported to NSLDS and appear on Institutional Student Information Records (ISIRs), Student Aid Reports (SARs), and NSLDS's online screens.

RC1D — Overpayment Detail(OD)

NSLDS		03-02-1998	
PELL Aid Overpayment Summary		12:16:08	
School Code: 00104500 School Name: STONEWALL JACKSON STATE JUNIOR			
SSN: 444444444 Name: ALYCIA		P RENEE DOB: 01-17-1968	
MORE:			
Sel	Disbursement Date	Type	Ovrpmt
	(MM - DD - CCYY)	Indr	(MM - DD - CCYY)
-	09 - 12 - 1997	PE	Y
-	01 - 26 - 1998	PE	R
Date Repaid	School/Br	Source	Reg
(MM - DD - CCYY)	Code		Inact
01 - 26 - 1998	00104500	SCH	Code Flg

Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)

Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),

Satisfactory arrangement made (S)

Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

RC1D Aid Overpayment Summary (FAT)

ENROLLMENT TRACKING

Notes: _____



Student Status Confirmation Report

Student Status Confirmation Report (SSCR) information is used by FFEL lenders, guaranty agencies, and the Direct Loan servicer to verify a borrower's enrollment status. Accurate enrollment information is necessary to determine when a borrower is ready to enter repayment.

RC71	U	Display Student(D)	Update sscr(U)	List Address(LA)
Past enrollment Status change(PS)				
NSLDS			03-18-1998	
SSCR Online Update			09:04:20	
School/Branch Code... 00104600 TALLADEGA COLLEGE				
SSN... 043882658 First Name... COREY DOB... 12-06-1974 (MM-DD-YYYY)				
Last Name: REED Curr SSN.: 043882658				
----- Current School Status Change (Mandatory) -----				
Anticipated Completion Date... 05-24-1998 (MM-DD-YYYY)				
Enrollment Code... F Enrollment Code Effect Date... 09-05-1997 (MM-DD-YYYY)				
Certification Date... 09-15-1997 (MM-DD-YYYY)				
Student Designator... 741293 (Optional)				
---- Student Information Change (Optional) ----				
SSN... First Name... Middle Initial...				
Last Name... DOB... (MM-DD-YYYY)				
--- Permanent Address Information (Optional)---				
Address Line 1... 2030 F ST. NW				
Address Line 2...				
City... Minneapolis State... MN Zip Code... 22563				
Country... US Effective Date... 09-05-1997 (MM-DD-YYYY)				
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT				

RC71 SSCR Online Update

RC7C

```

                                NSLDS                      11-21-1995
                                Student Address List        12:37:48

First name: CHRIS           Last name: LAMBART           SSN: 037000002
Sel      Please make a selection(S) and press ENTER      MORE: +
- Address line 1: 1234 HICKERY STREET ONE
  Address line 2: ROSEMONT PLAZA
  City.....: ROSEMONT                      State: PA  Zip: 22051-0001
  Country.....: UNITED STATES OF AMERICA    Effective Date: 11-01-1995
- Address line 1: 1910 CHERRY LANE
  Address line 2: CAVALIER COURT
  City.....: CHANTILLY                      State: VA  Zip: 22031-1961
  Country.....: U.S.A.                      Effective Date: 01-01-1993
- Address line 1: 423 WILSON BOULEVARD
  Address line 2: PROVIDENCE HALL
  City.....: DALE CITY                      State: VA  Zip: 32861-1995
  Country.....: U.S.A.                      Effective Date: 11-24-1992
- Address line 1: 1906 GALLOWES ROAD
  Address line 2: MERRYFIELD HOUSING
  City.....: MERRYFIELD                     State: VA  Zip: 16411-1000
  Country.....: U.S.A.                      Effective Date: 02-13-1991

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

RC7C Student Address List

RC7D __ Add(A) Change(C) Delete(DE)

```

                                NSLDS                      03-13-1998
                                Past Enrollment Status Change 08:05:00

Sch/Br Code.: 00104800  TROY STATE UNIVERSITY @ DOTHAN
Student Name: COREY           REED                      SSN: 043882658
Anticipated Compl Date: 12-15-1998  (MM-DD-YYYY)        (MM-DD-YYYY)
Enrollment Code.. Effective Date..__-__-__  Cert Date..__-__-__
----- Current Status -----
Enroll Code: M  Effec Date: 01-01-1998  Cert Date: 01-05-1998  Source: SSCR
Make a selection (S) and press ENTER for UPDATE or DELETE
  Enroll
Sel Code Description                      Effect Date  Certi Date
-   A  APPROVED LEAVE OF ABSENCE          10-01-1997  10-15-1997
-   L  LESS THAN HALF TIME                01-01-1994  02-15-1994

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

RC7D Past Enrollment Status Change

BORROWER TRACKING

NSLDS's online borrower tracking function is used by schools, guaranty agencies, and loan holders.

Notes:



Borrower Tracking

- The borrower tracking function benefits schools by:

- providing a complete history of the borrower's Title IV loans
- identifying possible sources of correct address data

RC83	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)
	Guar agency Hist(GH)	Attendance His(AH)	School servicer His(SH)

NSLDS		04-24-1997
Loan History Selection		09:16:48

Student Name: TOMMY	T AYALA	SSN: 122001669
PLUS Name....:		SSN:
Current School/Branch Code:		
Current School Name.....:		
City.....:	State:	

Loan Sel	Certification/Type	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: Originating School/Branch
- SF	07-17-1994	08-01-1994	05-31-1995	5000	RP	00371400
- SF	10-26-1993	08-01-1993	05-31-1994	4200	RP	00371400
- SU	08-30-1992	08-01-1992	05-31-1993	3800	RP	00371400

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC83 Loan History Selection

RC86 — Aid profile 1(A1) Lender History(LH) Guaranty agency History(GH)
School servicer History(SH) Loan history(LO)

NSLDS 04-24-1997
Loan Detail 09:22:15

Student Name: TOMMY T AYALA SSN: 122001669
PLUS Name...: SSN:
Loan Type: SF Amount: 5000 Certification/Guaranty Date: 07-17-1994
Period Begin Date...: 08-01-1994 Period End Date...: 05-31-1995

Outstanding Principal Bal: 3000 Outstanding Principal Bal Date: 04-15-1997
Outstanding Interest Bal.: 150 Outstanding Interest Bal Date.: 04-15-1997

MORE:

-- Disbursement --		-- Cancellation --		---- Refund ----		---- Status ----	
Date	Amount	Date	Amount	Date	Amount	Date	Code
09-30-1994	2500					12-31-1995	RP
01-31-1995	2500						

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC86 Loan Detail

RC93 — Organization Contact(OC)

NSLDS 04-24-1997
Current Data Provider Information 09:10:12

Student/Borrower Name: TOMMY T AYALA SSN: 122001669
MORE
GA Code...: 740 Name: OKLAHOMA GUARANTEED STUDENT LOAN PROGRAM
Street Address...: P.O. BOX 3000
City...: OKLAHOMA CITY State: OK Zip Code: 731010000
Resp Begin Date...: 08-30-1992

Name:

Street Address...:
City...: State: Zip Code:

Name:

Street Address...:
City...: State: Zip Code:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC93 Current Data Provider Information

How Does NSLDS Search for Data Online?

Locating Borrowers and Analyzing Loans

■ NSLDS follows these steps to locate borrowers and to analyze their loans:

- Step One: Searches for borrower records based on specific data elements.
- Step Two: Retrieves the borrower record from the database.
- Step Three: Displays the result of the search, online.

In using NSLDS's functions, the first step is often to **populate the data screen** by entering information that will identify the student. Generally, this means the Social Security number, first name, and date of birth. When these three data items are entered, NSLDS will provide access to its information on the specified borrower. However, the Borrower Tracking and Aid Overpayment functions will permit school users to search the database with **just a Social Security number**.

- ◆ For example, this can help you identify borrowers who do not get prescreened due to comment code 138. This code appears on the SAR/ISIR when the SSN on the FAFSA is found in NSLDS, but the name on the FAFSA does not match the name in NSLDS.
- ◆ Limit your use of the SSN-only search to solving problems like this, since ED tracks users to safeguard against unwarranted "browsing" of records and to protect the privacy of borrowers in the database.

Notes:





Timelines

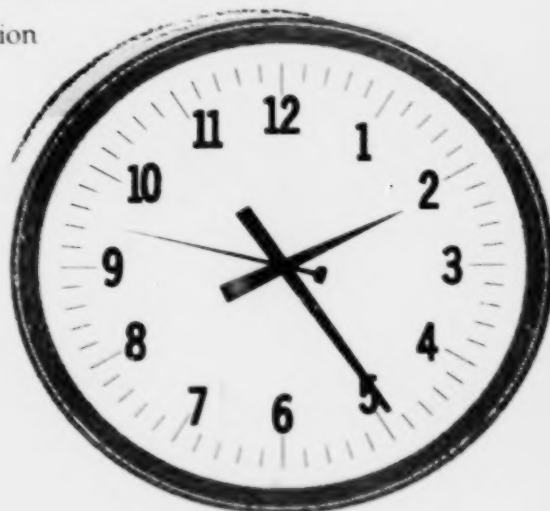
Objective

After completing this session, you will be able to:

- ◆ understand the dates and reporting requirements necessary to ensure compliance with ED's NSLDS functions.

Contents

- ◆ Student Status Confirmation Reports
- ◆ Reporting Federal Perkins Loan Information
- ◆ Reporting Overpayment Information



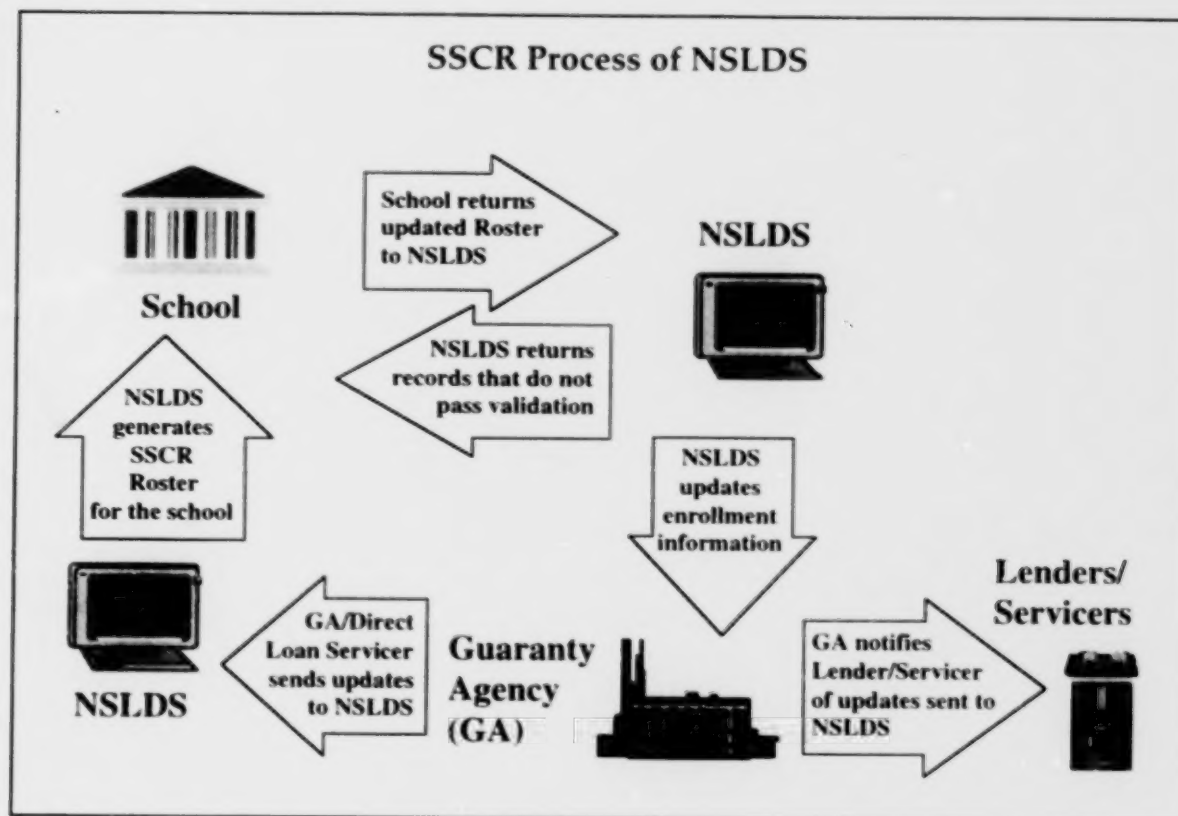
STUDENT STATUS CONFIRMATION REPORTS

NSLDS generates the SSCR Roster File and transmits it to the school via the Title IV Wide Area Network (Title IV WAN).

- ♦ Schools receive the SSCR Roster File in their Title IV WAN mailboxes.

Schools return the updated roster file, called the SSCR Submittal File, to NSLDS. NSLDS then forwards new and changed data to each affected guaranty agency and/or the Direct Loan servicer.

Notes:



SSCR Timeframes

Notes:



School SSCR Submission Schedule Requirements

- Minimum of two and maximum of six SSCRs in a 12-month period
- May not schedule SSCR rosters for successive months
- At least one SSCR required each regular term, if term-based school

School SSCR Submission Schedule Requirements (cont'd)

- If fewer than four SSCRs scheduled, must be scheduled at least four months apart
- Schools may change SSCR schedule at any time, as long as ED's scheduling requirements are met

Examples of SSCR Cycle Dates		
Semester Schools	Quarter Schools	Other Schools
September	October	October
November	December	December
January	February	February
March	April	April
May or June	June	June
		August

SSCR Submittal Files

According to 34 CFR 682.610(c) and 34 CFR 685.309(b), schools must return SSCR Submittal Files within 30 days.

- ♦ If schools do not comply, they are subject to fines or other ED administrative sanctions.

SSCR Error Notification Files

NSLDS generates an error report on receiving the school's roster file. The error report is called an SSCR Error Notification File.

The SSCR Error Notification File:

- ♦ is generated even if no errors appear in school's SSCR Submittal File
- ♦ documents school's compliance with SSCR requirements

- ◆ if there are errors, school must correct errors within ten days of date Error Notification File was generated
- ◆ all unresolved errors appear in next SSCR cycle
- ◆ if there are no errors, school need not respond
- ◆ school can correct errors online

Notes:



REPORTING FEDERAL PERKINS LOAN INFORMATION

Schools (or their third-party servicers) must report monthly on:

- ◆ new loans
- ◆ loans for which NSLDS required data

Schools must report information such as:

- ◆ changes in status
- ◆ name changes

When there are no changes on an active loan, schools may report quarterly.

REPORTING OVERPAYMENT INFORMATION

Under an Action Letter planned to be issued in July 1998, schools are required to enter all overpayment information into NSLDS by August 15, 1998.

Following this initial entry, schools must input new overpayment information into NSLDS no later than 30 days after becoming aware of:

- ◆ a new overpayment
- ◆ a change to a previously reported overpayment

Schools should report to NSLDS all overpayments that have not been cleared, including overpayments for which students have made satisfactory repayment arrangements. However, schools should not report overpayments:

- ◆ paid or otherwise resolved, or
- ◆ previously reported to ED's Debt Collection Service

Notes:





Problem Resolution

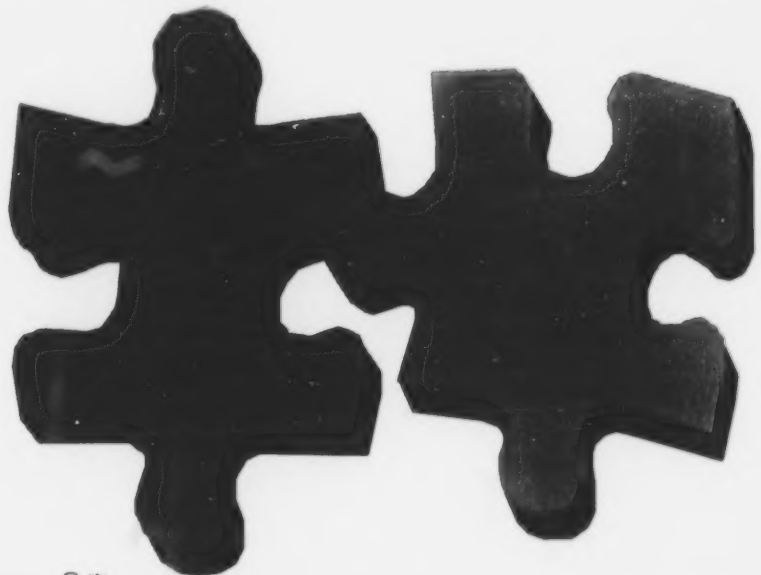
Objectives

After completing this session, you will be able to:

- ♦ identify the different NSLDS resources available to help schools, and
- ♦ use these resources to resolve problems.

Contents

- ♦ Customer Service Center
- ♦ Organization Contact Screens
- ♦ Problems That Schools Encounter



CUSTOMER SERVICE CENTER

NSLDS Customer Service Center

- The Customer Service Center is operated by the NSLDS contractor:

NSLDS
Customer Service Center
1-800-999-8219
Monday-Friday*
8 a.m. - 8 p.m. (Eastern Time)

*except federal holidays

Customer Service Center Functions

- Resolve users' transmission problems
- Notify users of problems affecting system availability and performance
- Document users' problems and inquiries
- Identify users' training needs

Customer Service Center Functions (cont'd)

- Help resolve users' problems with NSLDS system/software, PC software/hardware, and missing/late reports
- Monitor and resolve problems with system availability, processing times, priorities, and related performance issues
- Answer security-related issues

Notes:



ORGANIZATION CONTACT SCREENS

```

RC16      _ Display(D)

                                NSLDS                                06-30-1998
                                Organization Contact Information        12:16:54

Organization Type.: SCH      + Name: SCHOOL
Organization Code.: 001045   + Name: STONEWALL JACKSON STATE JUNIOR COL  +
Organization Branch: 00

For Detailed Contact information make a (s)election and press ENTER.

Sel Function      First Name  Last Name      Phone      Ext
- Primary Contact  STACY      WASHINGTON     703-232-9961 361
- SSN/ID Issues   ROGER      PALFREY       703-232-9987 387
- FAT/SAR/ISIR Issues KESHIA    TODD          703-232-9993 393
- Default Issues  ANNE      CULVER        703-232-9998 398
- Overpayment Issues HUGH      WHITE         703-232-9975 375
- Perkins Issues  BETTY     SWEARINGER    703-232-9902 302
- FFEL Issues     JAMES     CHONG         703-232-9924 324

F3=EXIT F4=PROMPT F7=BACKWARD F8=FORWARD
  
```

RC16 Organization Contact Information (List—by Function)

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RC17

                                NSLDS                                06-30-1998
                                Organization Contact Information Detail  12:16:55

Organization Code.: 00104500
Organization Name.: STONEWALL JACKSON STATE JUNIOR COL
Address.....:
City.....: RAINSVILLE      State: AL  Zip Code.: 35986-3333
Phone .....: 703-232-9000

Function.....: Perkins Issues

Contact Name First: BETTY      Update Date.....: 06-30-1998
                  Last.: SWEARINGER
Title.....: LOAN MANAGER
Phone.....: 703-232-9902      Ext.: 302
Fax.....: 703-232-9119
E Mail.....: B_SWEARINGER@JACKSON.EDU
Address.....: HOLKER HALL ROOM 250
                  3000 CAMPUS DRIVE
City.....: RAINSVILLE      State: AL  Zip Code.: 35986-3333

F3=EXIT F4=PROMPT
  
```

RC17 Organization Contact Information Detail

PROBLEMS THAT SCHOOLS ENCOUNTER

NSLDS data sometimes do not match the information that the school has.

Resolving Conflicting Data

- Identify conflicting data
- Identify data provider
- Contact data provider
- Contact NSLDS Customer Service Center, if necessary

Data providers are:

- ◆ For FFEL Program loans—the guaranty agency or ED's Debt Collection Service (DCS), as appropriate.
- ◆ For Direct Loans—the Direct Loan servicer or ED's DCS.
- ◆ For Perkins Loans—the school that reported the loan or ED's DCS.
- ◆ For Pell Grant payment information—the school that reported the payment.
- ◆ For overpayments—the school that reported the overpayment or ED's DCS.

Notes:



Example Problem 1

A school might know that a student who was once in default has made satisfactory arrangements with his FFEL lender to repay the loan and has made six consecutive payments, so that this loan no longer prevents the student from being eligible for Title IV aid. However, NSLDS still shows that he is in default, so the Institutional Student Information Record (ISIR) you receive for him has a comment code 132 ("Applicant in default") and/or a status code of DU* ("Defaulted, unresolved") instead of DX* ("Defaulted, six consecutive payments"). This means you can't award him Title IV aid until the matter is resolved. What do you do?

* NSLDS Status Codes are listed in Session 7 and on pages 10-2 and 10-3 of the NSLDS Quick Reference Guide.

Notes:



Example Problem 2

A student files the Free Application for Federal Student Aid (FAFSA). Her Social Security number (SSN) on the FAFSA matches a record in NSLDS, but her name and date of birth (DOB) on the FAFSA don't match the NSLDS record. The ISIR you receive for the student has a comment code 138, which means the SSNs match but the name and/or DOB do not match. As a result, no NSLDS data are sent. You can't award aid to the student until the matter is resolved. What do you do?

Working With Data Providers

When users experience problems with data providers, they should contact the NSLDS Customer Service Center at 1-800-999-8219.

Problems While Working With NSLDS Screens

If you call the Customer Service Center, be at your workstation and be prepared to provide the information below.

Problems While Working With NSLDS Screens

- Five important pieces of information to give the customer service representative:
 - type of workstation hardware and software
 - exact wording of any messages displayed on screen
 - NSLDS screen identifier
 - description of the problem
 - what you tried to do to fix the problem

Notes:



**ANSWER KEY**

Notes:

**Example Problem 1**

Here is one approach you could take:

- ♦ Make sure you have proper documentation in the student's file showing that he has made satisfactory repayment arrangements and six consecutive payments.
- ♦ Award and disburse aid according to the student's eligibility.
- ♦ Use NSLDS Borrower Tracking screens to find the data provider that reported the student's loan was in default.
- ♦ Use the NSLDS Contact screens to obtain the name, telephone number, and address of the data provider.
- ♦ Contact the person at the data provider and ask him or her to report the change directly to NSLDS.

Example Problem 2

There could be a number of reasons that the SSN, name, and DOB on the FAFSA don't match the information in NSLDS, such as:

- ◆ The student may have entered her SSN incorrectly on the FAFSA.
- ◆ A data provider may have reported another person's SSN, name, or DOB incorrectly to NSLDS.
- ◆ The Social Security Administration may have inadvertently assigned the same SSN to two people.

Here is one approach you could take:

- ◆ The school must first determine if the existing NSLDS record is the student's. If so, it must use NSLDS information to determine Title IV eligibility.
- ◆ The school should access NSLDS directly online to determine if the matched SSN in NSLDS belongs to the student. The school should compare the information it has about the student to the data contained in NSLDS.
 - For example, if the name of the student as reported on the SAR or ISIR is a nickname and the name in NSLDS is the applicant's actual name, the school should use the information in NSLDS when determining the student's Title IV eligibility.
 - Similarly, if the school has information that the student attended XYZ University during the 1995-96 award year and the

Notes:



NSLDS record shows that Title IV aid was received at XYZ University during the same award year, it might assume that the data in NSLDS belong to the student.

Notes:

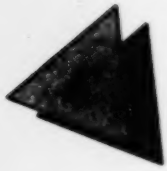


- ◆ In many cases, the school will need to discuss the discrepancies with the student before making its final decision.
- ◆ If the student has made a mistake in reporting SSN, name, or birth date on the FAFSA and you have the proper documentation, tell the student to send a correction to the Central Processing System. The application then will go through the NSLDS match again, which should resolve the discrepancy.
 - You don't need to wait for the results on the next ISIR to continue the awarding process, because you can use the corrected data in NSLDS.
- ◆ If you find that the student has correctly reported her SSN on the FAFSA, then a data provider may have reported another person's SSN incorrectly or the Social Security Administration may have assigned the same SSN to two people.
 - If, after reviewing NSLDS data, you determine that the data are not the student's financial aid history, you can continue the awarding process using the assumption that the student has not received any relevant Title IV aid.

- ◊ In this instance, while not required, it would be helpful if you would contact the data provider that submitted someone else's information to NSLDS using the applicant's SSN, explain the error, and have it corrected.
- If it turns out that the Social Security Administration has assigned the same SSN to two people, the Social Security Administration must resolve the discrepancy.

Notes:





Connecting to NSLDS

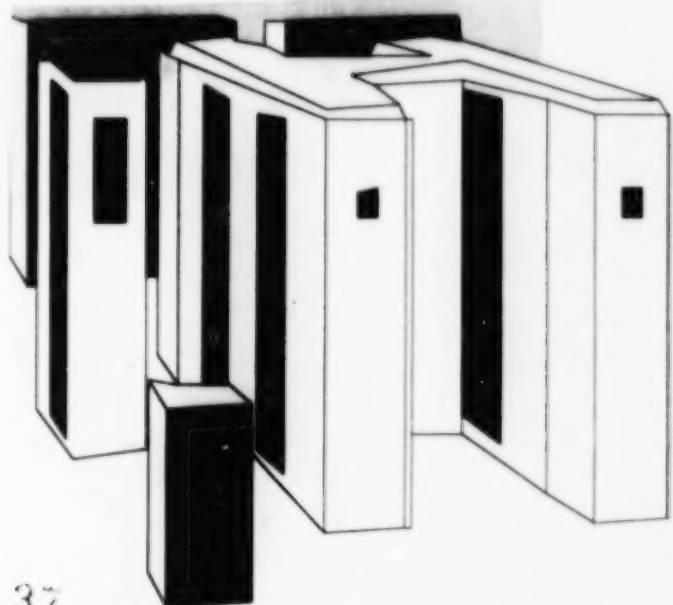
Objectives

After completing this session, you will be able to:

- ◆ determine hardware and software needs for submitting and receiving NSLDS data electronically, and
- ◆ describe the main capabilities of ED's Title IV WAN and NSLDS software.

Contents

- ◆ Title IV WAN
- ◆ Mainframe Schools
- ◆ Personal Computer (PC) Schools
- ◆ Year 2000 Compliant Systems



TITLE IV WAN

Notes:



Title IV WAN

■ Provides for the following functions:

- complete and send electronic initial applications and renewal applications
- receive electronic Institutional Student Information Records (ISIRs)
- make electronic corrections
- send and receive electronic payment information for Pell Grant recipients

Title IV WAN (cont'd)

- receive electronic Statements of Account for Pell Grant Program
- exchange data with Direct Loan Origination Center to originate, draw down, disburse, and reconcile Direct Loans
- send and receive NSLDS data
- transmit, receive, and report FISAP data

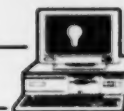
Completing the Enrollment Documents

To participate in the Title IV WAN, schools submit required forms, list a destination point contact, and indicate desired services.

Title IV WAN Enrollment Documents

- Title IV WAN Customer Initiation Document
- Letter of Application (LOA)
- Participation Agreement (PA)
- Mainframe Requirements Document

Notes:



ED-Provided Software

There are two ways schools can access the Title IV WAN:

- ◆ mainframe and/or
- ◆ personal computer (PC)

ED provides EDconnect software to enable both types of computers to connect to the Title IV WAN, access Title IV WAN mailboxes, and transmit and receive batches of financial aid information.

- ◆ The version of EDconnect supplied for PCs includes NetConnect software that allows online (interactive) access to NSLDS.

For help with mainframe or PC questions about connecting to the Title IV WAN, call Title IV WAN Customer Service at 1-800-615-1189.

MAINFRAME SCHOOLS

Schools that use mainframe computers to connect to the Title IV WAN receive the mainframe version of the EDconnect package of communications software.

- ♦ Runs on IBM or IBM-compatible mainframe with MVS operating system.

Mainframe schools can also request a mainframe version of ED's DataPrep software for Perkins Loan reporting.

- ♦ Also runs on IBM or IBM-compatible mainframe with MVS operating system.

Through a mainframe, only **batch** access to NSLDS is possible.

ED required schools to have **online** access to NSLDS as of January 1, 1998. Therefore, mainframe schools must also have at least one PC to provide online access.

- ♦ This requirement can be satisfied through a third-party servicer that provides the necessary online access to NSLDS.

PERSONAL COMPUTER (PC) SCHOOLS

Schools that use PCs to connect to the Title IV WAN receive the PC version of the EDconnect package of communications software.

- ♦ This includes NetConnect, which provides online access to NSLDS and other ED databases.
- ♦ Schools can also request a PC version of ED's DataPrep software for Perkins Loan reporting.

Notes:



The current PC version of EDconnect runs under DOS or Windows:

- ♦ MS-DOS version 6.2 or higher, configured to provide maximum conventional and extended memory, with 620 K of conventional RAM available; or
- ♦ Windows 3.1, Windows 3.11, or Windows 95.

However, the minimum configuration required by January 1999 is shown below.

PC Configuration

■ Minimum configuration by January 1999:

- IBM or fully IBM-compatible PC with at least a 200 MHz Pentium processor or compatible
- Windows 95 or Windows NT 4.x
- 64 MB of total memory
- 4.0 GB SCSI hard drive
- 3.5-inch 1.44 MB floppy disk drive

PC Configuration (cont'd)

- 56 K analog modem
- SVGA monitor
- Windows 95 keyboard
- Dedicated phone line
- Printer that prints on standard paper
- To use EDEpress Tutorial and AWARE software, 12x CD-ROM drive with sound card

Notes:



NetConnect

ED's NetConnect software is available only for personal computers. It provides interactive online access, providing the functions below.

Using NetConnect

■ Destination points can:

- access Title IV databases, such as CPS and NSLDS, depending on their authorization
- view transmission history that is updated continuously rather than every 24 hours
- see when products were shipped to them
- browse online
- access billing information
- in the case of third-party servicers, see what institutions they service

Notes:



YEAR 2000 COMPLIANT SYSTEMS

ED is requiring that all computer systems schools use for processing financial aid data be "Year 2000 Compliant" by January 1, 1999. By this date, all of your school's financial aid data processing systems, procedures, and protocols must be able to store and report date information in ways that differentiate between years prior to 2000 and Year 2000 and beyond.

- ◆ This requirement also applies to any third-party servicer your school may contract with to administer Title IV programs.

For further information regarding the requirement to become "Year 2000 Compliant" see:

- ◆ Dear Colleague letter GEN-98-1
- ◆ Web page at: www.ed.gov/y2k



School and Third-Party Servicer Responsibilities

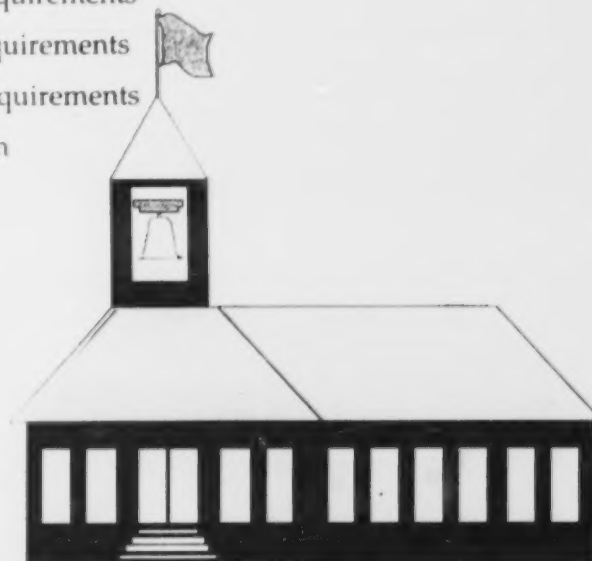
Objectives

After completing this session, you will be able to:

- ◆ describe SSCR, financial aid history, Perkins Loan, overpayment, and organization contact screen responsibilities,
- ◆ implement NSLDS security measures,
- ◆ develop procedures to assure the integrity of the data the school sends to NSLDS, and
- ◆ describe ED's electronic message process.

Contents

- ◆ Student Status Confirmation Report Requirements
- ◆ Financial Aid Transcript Requirements
- ◆ Perkins Loan Reporting Requirements
- ◆ Overpayment Reporting Requirements
- ◆ Organization Contact Screen Responsibilities
- ◆ Privacy Requirements
- ◆ Data Input and Integrity
- ◆ ED's Electronic Messages



STUDENT STATUS CONFIRMATION REPORT (SSCR) REQUIREMENTS

Schools are required to report the enrollment status of students who receive federal loans.

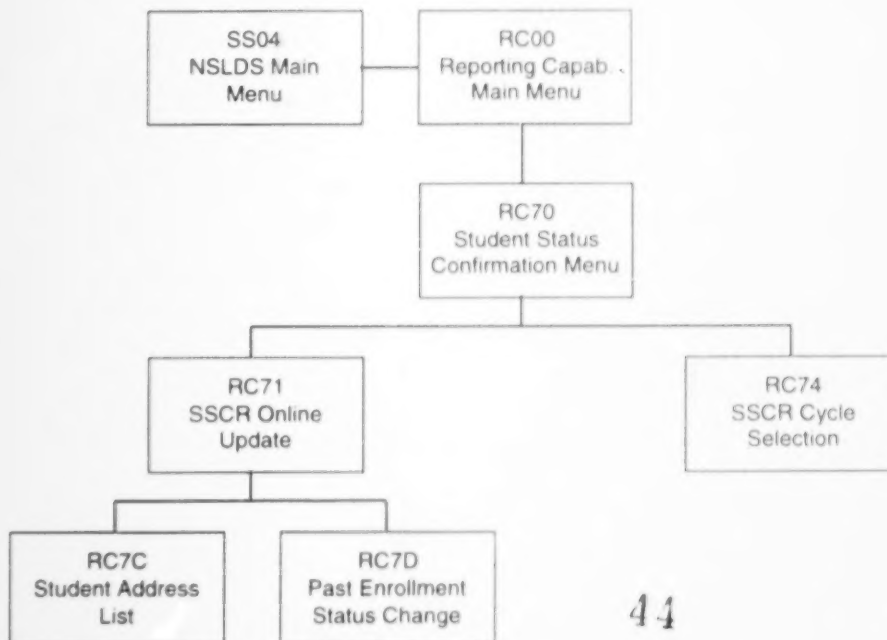
SSCR Regulatory Requirements

- SSCR reporting is required by the Higher Education Act, as amended
- The requirements for FFEL Program loans are in 34 CFR 668.610(c)
- The requirements for Direct Loan Program loans are in 34 CFR 685.309(b)

Notes:



Paths to the Main SSCR Screens Used by Schools.



■ On receiving the SSCR Roster File, the school must:

- match the SSCR Roster File against enrollment records
- update each student's enrollment status and enrollment status effective date
- propose changes to student identifiers (SSN; last name, first name, middle initial; and DOB), as needed
- update or add student address data, as needed

SSCR Roster File (cont'd)

- add new students to the SSCR Roster File, as needed
- return the updated SSCR Roster File, which becomes the SSCR Submittal File, to NSLDS within 30 days of the date the SSCR Roster File was sent to the school
- retrieve and, if necessary, process the Error Notification File provided by NSLDS

SSCR Implementation

Most schools have now received the Successful Completion letter shown on the next page. ED will:

- ◆ assist schools that have shown evidence of complying with required SSCR processing through NSLDS
- ◆ take enforcement action against schools not attempting to comply

Notes:



SUCCESSFUL COMPLETION LETTER

Financial Aid Director
College XYZ
Newtown, PA 12223

Dear Financial Aid Director:

I am pleased to inform you that your school has successfully completed an NSLDS electronic SSCR cycle. You have received, completed, and returned an SSCR file and have properly processed its corresponding error report. Thank you very much for your efforts. The Department appreciates your help in moving forward with this new and important initiative.

Because of your success with the initial roster, effective immediately you are exempt from processing SSCRs generated and sent to you by guaranty agencies. All guaranty agencies have received a list of those schools that are exempt, but you should keep a copy of this letter in the event questions arise.

You will now begin to receive SSCRs from the NSLDS according to your individual processing schedule. That schedule is available to you via on-line SSCR screens in NSLDS. If you have not set your schedule, one has been set for you. Please review your schedule and modify it as necessary according to your school's calendar or workload.¹

All SSCR rosters must be returned to NSLDS within 30 days of receipt and responses to error files must be submitted within 10 days.

If you have any questions concerning the SSCR process, please feel free to call our Customer Service Center at (800) 999-8219.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

¹Because different schools have different academic calendars, NSLDS's SSCR process lets you determine how your school can best meet its reporting requirements. You may choose up to six cycles each year, **the more the better**. When establishing your schedule, please comply with the following: regular term-based schools (semester, quarter, or trimester) must complete at least one SSCR cycle each term; a summer session does not count as a term; schools that do not use regular terms must complete at least two SSCR cycles each year at dates they choose, but at least four months apart; all reporting cycles must be at least sixty days apart.

Overdue SSCRs

ED is monitoring schools to ensure that SSCRs are being returned to NSLDS within the required 30-day time frame. If schools do not return SSCRs within this time frame, they are sent overdue letters.

Overdue Letters

- First Overdue Letter — School has not returned the SSCR within 30 days
- Second Overdue Letter — School is more than 18 days past the 30-day deadline
- Third Overdue Letter — School is more than 28 days past the 30-day deadline

Sample letters are shown on the next three pages.

Notes:





UNITED STATES DEPARTMENT OF EDUCATION
National Student Loan Data System
600 Independence Avenue, SW
Regional Office Building 3, Room 4520, M/S 5384
Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

FINANCIAL AID ADMINISTRATOR
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #1

Dear Financial Aid Administrator:

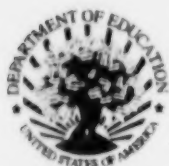
This letter is notification that your MM-DD-YYYY Student Status Confirmation Report (SSCR) file has not been returned by your school to the National Student Loan Data System (NSLDS). As you know, timely submission of SSCR data is necessary in order to provide for the protection of student borrowers under the federal loan programs as well as to ensure the fiscal integrity of the programs. It is extremely important that all SSCR files sent to your institution be returned to the NSLDS within 30 days of receipt. Unless you have already done so within the past ten days, please submit your completed SSCR immediately.

If you have experienced transmission or other technical problems with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219. We look forward to receiving your SSCR within the next few days and thank you for your cooperation in this important effort.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

48

**UNITED STATES DEPARTMENT OF EDUCATION****National Student Loan Data System**

600 Independence Avenue, SW
Regional Office Building 3, Room 4520, M/S 5384
Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

PRESIDENT
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #2

Dear President:

This letter alerts you that the Student Status Confirmation Report (SSCR) file that was sent to your school on MM-DD-YYYY by the National Student Loan Data System (NSLDS) has not yet been processed and returned to the NSLDS. The SSCR process requires timely submission of data in order to protect rights of student borrowers under Federal student loan programs as well as to ensure the fiscal integrity of the programs. It is extremely important that all SSCR files sent to your institution be returned to the NSLDS within 30 days of receipt. This is the second reminder we have sent. (The first reminder was sent to your school's Financial Aid Administrator and Registrar.)

Please be aware that not processing SSCR files in a timely way could result in your institution's being subject to one or more of a series of adverse actions that the Department of Education may take under its statutory and regulatory authority. Please submit your complete SSCR immediately. This alert is also being sent to your President and Registrar.

If you have experienced transmission or other technical problems with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219. We look forward to receiving your SSCR within the next few days and thank you for your cooperation in this important matter.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

49



UNITED STATES DEPARTMENT OF EDUCATION
National Student Loan Data System
600 Independence Avenue, SW
Regional Office Building 3, Room 4520, M/S 5384
Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

PRESIDENT
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #3

Dear President:

Approximately one week ago, I sent you a letter informing you that the Student Status Confirmation Report (SSCR) file that was sent to your school on MM-DD-YYYY by the National Student Loan Data System (NSLDS) has not been processed by your school and returned to the NSLDS. That letter was the second reminder sent to your school and it informed you that the Department of Education may take one or more adverse actions against your school if the SSCR was not promptly submitted. This letter is a final warning that if the most recent SSCR is not returned within ten days of the date of this letter, I will refer the matter to the Department's Administrative Actions and Appeals Division for immediate action as provided under regulations at 34 CFR 668, subpart G. Such actions could include the imposition of a fine or the initiation of a Limitation, Suspension, or Termination action that could remove your school from participation in all Title IV programs.

I regret that we have found it necessary to take such action but, as stated in the earlier letters, the importance of compliance with the requirements for submission of SSCR data cannot be minimized. A copy of this notice is also being sent to your Financial Aid Administrator.

If you have experienced transmission or other technical problems with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

50

Equal Responsibility

- Schools and third-party servicers are equally responsible and severally liable if regulatory requirements are not met — 34 CFR 668.25(c)(3)
- Schools and third-party servicers could both be subject to administrative actions



Notes:



FINANCIAL AID TRANSCRIPT REQUIREMENTS

Schools are required to obtain information about students who previously attended other schools. This allows schools to determine student eligibility for Title IV assistance. Instead of requesting paper FATs, schools may use information from NSLDS:

- ◆ online, from the FAT screens
- ◆ from batch NSLDS FATs
- ◆ on the Student Aid Report (SAR)
- ◆ on the NSLDS Financial Aid History page of the Institutional Student Information Record (ISIR)

School Liability When Using NSLDS

If the school had access at the time it initially reviewed NSLDS data to conflicting information that showed a lack of, or reduced, eligibility of the student, then it is liable.

Once a school becomes aware, through NSLDS or any other means, that a student is not eligible and/or was not eligible for Title IV aid previously disbursed, it must:

- ◆ not disburse or deliver additional funds
- ◆ assist ED or the lender in requiring the student to make arrangements to repay any funds the student was not eligible to receive

Notes:



PERKINS LOAN REPORTING REQUIREMENTS

Schools have monthly and/or quarterly Perkins Loan reporting requirements, as described in Session 2.

Notes:



OVERPAYMENT REPORTING REQUIREMENTS

Under an Action Letter planned to be issued in July 1998, schools have both initial entry and ongoing overpayment reporting requirements, as described in Session 2.

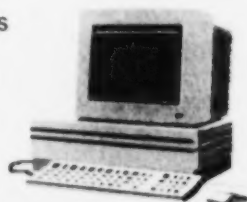
ORGANIZATION CONTACT SCREEN RESPONSIBILITIES

Schools, guaranty agencies, and lenders are responsible for maintaining their own *Organization Contact Information* screens in NSLDS. Sample screens were shown in Session 3.

PRIVACY REQUIREMENTS

Security Standards

- Personnel
- Computer facilities
- Media (magnetic and print)



NSLDS contains highly confidential information, and your school must protect the privacy of the data by using security measures.

Notes:



◆ Personnel Security

- Individual users are personally liable for unauthorized disclosure of NSLDS data.
- All users must sign the Notice of Criminal Liability under the Privacy Act (see next page).

◆ Computer Facilities

- Locate computer terminal so personnel who are not authorized cannot view NSLDS screens.
- Don't leave computers unattended during online use.

◆ Magnetic Media and Printed Materials

- Clearly mark computer tapes, diskettes, and printed materials as containing information protected under the Privacy Act.
- Emphasize penalties for unauthorized disclosure of NSLDS data.
- Store in a secure place.

Notice of Criminal Liability under the Privacy Act

The information provided to me by the Department of Education is protected by the Privacy Act of 1974, as amended. The protection of this information, once entrusted to me, becomes my responsibility. Therefore, I agree to protect the privacy of all information that has been provided to me as an agent of the Department. I understand that the criminal penalties identified below may be enforced if I violate the requirements of the Privacy Act.

5 U.S.C. 552a, as amended,

(i)(1) Any officer or employee of an agency, who by virtue of his employment or official position, has possession of, or access to, agency records which contain individually identifiable information the disclosure of which is prohibited by this section or by rules or regulations established thereunder, and who knowing that disclosure of the specific material is so prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than \$5,000.

(2) Any officer or employee of any agency, who willfully maintains a system of records without meeting the notice requirements of subsection (e) (4) of this section shall be guilty of a misdemeanor and fined not more than \$5,000.

(3) Any person who knowingly and willfully requests or obtains any records concerning an individual from an agency under false pretenses shall be guilty of a misdemeanor and fined not more than \$5,000.

I certify that I have read and understood the criminal penalties of the Privacy Act, as stated above, and that I agree to comply with the government's requirements for the protection of any information covered by the Privacy Act.

Name and Date: _____

Typed Name: _____

DATA INPUT AND INTEGRITY

Schools as Data Providers

- Collect necessary information
- Code and test software necessary to format and produce database extract files
- Perform data verification edits
- Submit new and changed records
- Correct any data errors
- Transmit data using Title IV WAN

Data Input and Integrity

- Schools must submit data that are:
 - Complete
 - Accurate
 - Timely



Notes:



ED'S ELECTRONIC MESSAGES

ED transmits updates, announcements, and other important information to schools' Title IV WAN mailboxes.

- ◆ Schools must be able to access these important messages.



Software Setup

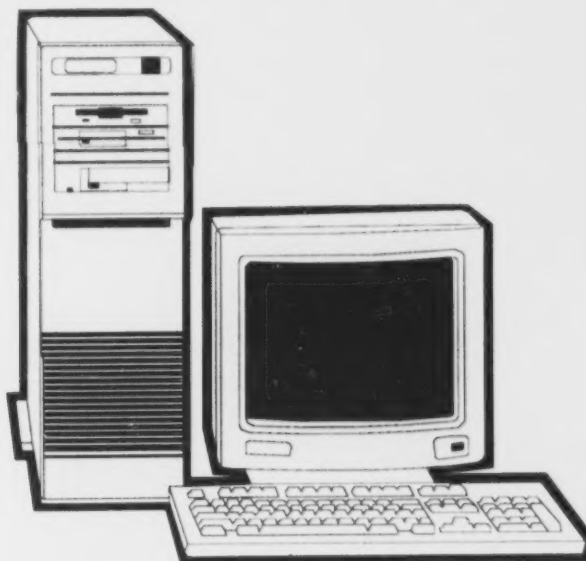
Objectives

After completing this session, you will be able to:

- ◆ dial up and log on to access the National Student Loan Data System, and
- ◆ navigate through NSLDS screens.

Contents

- ◆ Connecting to the Title IV Wide Area Network and NSLDS
- ◆ General NSLDS Screen Navigation



CONNECTING TO THE TITLE IV WIDE AREA NETWORK AND NSLDS

EDconnect is the telecommunications software used to send and receive data via the Title IV WAN. NetConnect is the dial-up software used to access online functions.

Destination Points

Each location that physically transmits and receives financial aid data via the Title IV WAN is called a "destination point" and must have a Title IV WAN User ID. A school can designate itself as a destination point, or it may designate a third-party servicer (or servicers) to be its destination point(s).

A school may have multiple destination points. For example, the Financial Aid Office, Business Office, and Registrar's Office may be different destination points.

NSLDS User Identification

Your school must have a Title IV WAN ID in order to apply for an NSLDS User ID.

To obtain an NSLDS User ID, you must:

- ◆ complete a Letter of Application
- ◆ sign the statement of "Notice of Criminal Liability under the Privacy Act"

Notes:



Passwords

Passwords should NEVER be:

- ◆ revealed to other people
- ◆ written down
- ◆ included as a part of an automatic logon sequence on any PC-based or memory-equipped terminal or system

When you log on for the first time, your initial NSLDS password expires. The system will prompt you to change your password.

- ◆ Your NSLDS password expires every 30 days. You will be prompted to change your password.
- ◆ If you do not log on for 120 days, your NSLDS access is revoked. You must call the NSLDS Customer Service Center to reactivate your access.

Notes:



GENERAL NSLDS SCREEN NAVIGATION

Page 1-3 of NSLDS's *Quick Reference Guide* shows a sample screen with many typical features, such as:

- ◆ **More Data Indicator** (at the right side of the screen)—there is a field called MORE that may contain "+" and/or "-" signs or be empty.
 - If there is a "+" sign, press F8 to see more information.
 - If there is a "-" sign, press F7 to go back to the previous screen.
 - If the MORE field is empty, the screen is showing all the available information.
- ◆ **Action Bar** (at the top of the screen)—tells available actions you can take. Action bars vary among screens.
- ◆ **Field Indicator**—If a field ends in a period, you may enter data. If it ends in a colon, the system automatically completes the data field.
- ◆ **System Message** (at the bottom of the screen)—provides an error message or other information.

Page 1-4 of NSLDS's *Quick Reference Guide* provides a list of the NSLDS function keys and other frequently used keys.

Notes:





Student Eligibility

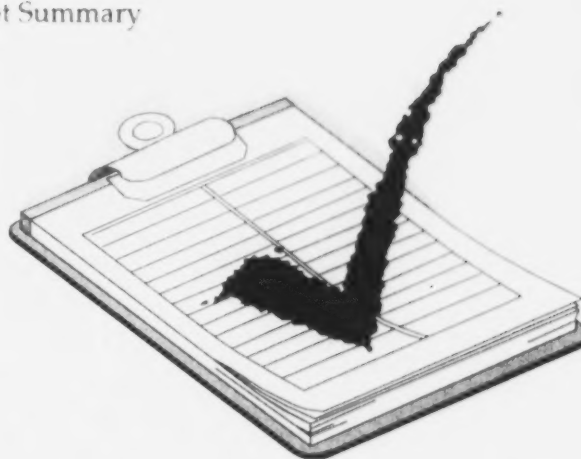
Objectives

After completing this session, you will be able to:

- ◆ describe the processes used to determine student eligibility, and
- ◆ navigate through Financial Aid Transcript Summary and Aid Overpayment screens.

Contents

- ◆ Prescreening
- ◆ Postscreening
- ◆ Financial Aid Transcript Summary
- ◆ Aid Overpayment
- ◆ Case Studies



PREScreenING

Prescreening identifies students who have:

- ◆ defaults on Title IV loans;
- ◆ overpayments on Pell Grants, Federal Supplemental Educational Opportunity Grants (FSEOGs), and Federal Perkins Loans; AND/OR
- ◆ approached loan eligibility for a single year.

Prescreening is not an online function. Schools perform prescreening by reviewing NSLDS data on applicants' ISIRs.

POSTScreenING

Beginning with the 1998-99 award year, ED implemented a new postscreening process.

- ◆ This is not an online function.
- ◆ This process allows ED to help schools identify any student whose eligibility has changed since the last SAR/ISIR was produced.

Postscreening tells you that a student:

- ◆ entered default on a Title IV loan that was previously not in default;
- ◆ cleared a previously reported default on a Title IV loan;
- ◆ owed a new overpayment on a Title IV grant or loan; or
- ◆ cleared a previously reported overpayment on a Title IV grant or loan.

When these situations occur, NSLDS sends the Central Processing System (CPS) a file identifying the affected applicants.

Notes:



- Notes:



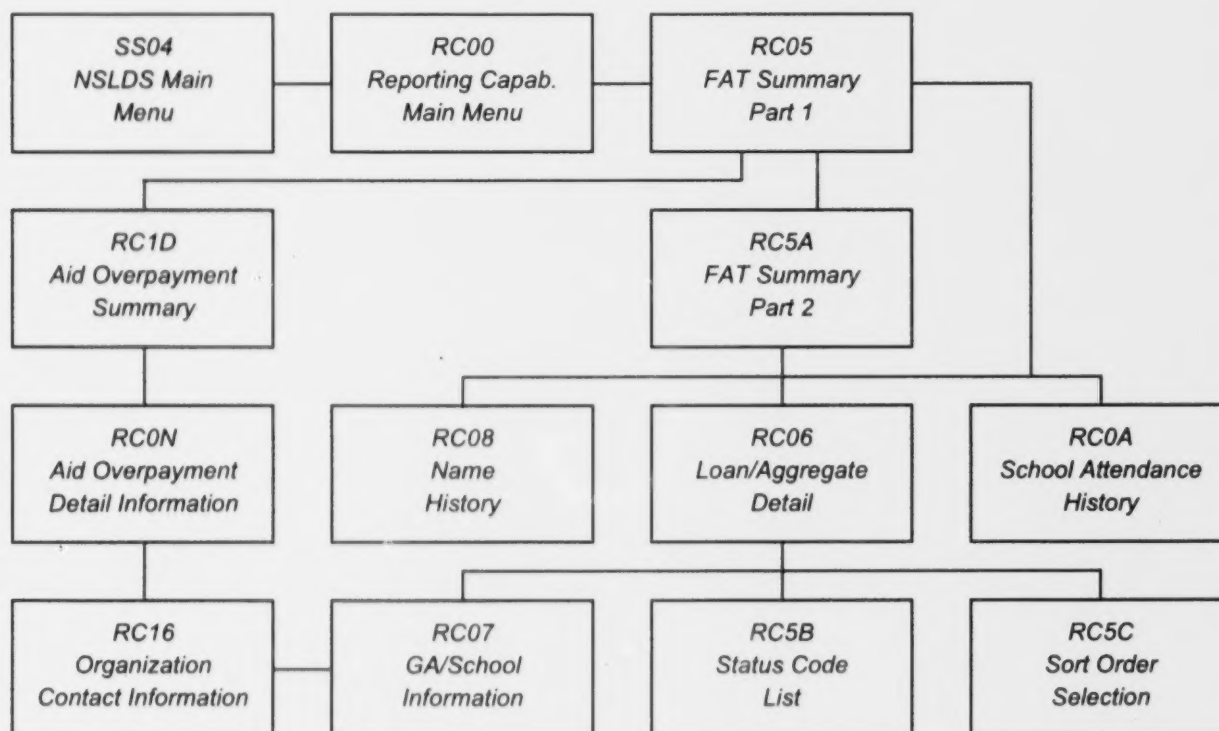
- ◆ These transactions include a system generated flag of “N” (for NSLDS) and a special SAR/ISIR comment (Comment #004) that informs the student and the school that a change in NSLDS is being reported that may affect the student’s eligibility for Title IV aid.

The Financial Aid Transcript (FAT) Summary function lets you review historical information online to determine student eligibility before disbursing financial aid.

The financial aid transcript screens are **view only**; you can't change the information online.

Online Screen Navigation

The next page shows a “map” of the screens included in NSLDS’s Financial Aid Transcript Summary function. Please pull out this page for reference during the rest of the session.



Map of NSLDS's Financial Aid Transcript Summary Function

Financial Aid Transcript Summary Part 1

Here's how you access the *RC05 Financial Aid Transcript Summary Part 1* screen:

Step 1: At the *SS04 NSLDS Main Menu* screen, type **2** (*Reporting Capabilities Main Menu*) and press **ENTER**.

Step 2: At the *RC00 Reporting Capabilities Main Menu* screen, type **5** (*Financial Aid Transcript Summary*) and press **ENTER**.

This will bring you to the *RC05 Financial Aid Transcript Summary Part 1* screen.

Notes:



SS04

NSLDS 03-02-1998
NSLDS Main Menu 12:15:47

Input the number of your choice and press ENTER.

- ☒ 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS 03-02-1998
Reporting Capabilities Main Menu 12:15:48

F3=

Input the number of your choice and press ENTER.

- ☒ 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security
5. Financial Aid Transcript Summary

RC05 — FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
Financial Aid Transcript Summary Part 1 12:15:49

F3

SSN.._____ First Name.._____ DOB..__-__-__ Schl Yr..1998
Curr SSN: Last Name: Name Hist: N
For Overpayment Summary Info make a selection (S) and press ENTER
Sel Overpayment Contact Defaulted Loans.... Discharged.....
Pell..... Loan Sat. Repayment: Active Bankruptcy:
FSEOG....
Perkins.. Perkins Cumulative Loan Amount..

For Aggregate Detail make a selection (S) and press ENTER

Aggregate Amount for FFELP/Direct Loans

Subsidized Loans		
Outstanding Prin. Bal.:	Pending Disb.:	Total:
Unsubsidized Loans		
Outstanding Prin. Bal.:	Pending Disb.:	Total:
Consolidated Loans		
Outstanding Prin. Bal.:		Total:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

Navigation Schematic for RC05
Financial Aid Transcript Summary Part 1

The *RC05 Financial Aid Transcript Summary Part 1* screen is not yet populated with data. The cursor automatically moves to the SSN field. To populate the screen, do the following:

- Step 1: Type the student's **SSN**. As an example, use **043 90 6703**. The cursor automatically advances to the First Name prompt.
- Step 2: Type the student's **first name**. As an example, use **Tara Marie**.
- Step 3: Press **TAB** to advance to the next prompt, Date of Birth (DOB). Type the student's **DOB** in MM-DD-CCYY format. As an example, use **02-16-1975**. Do *not* type the hyphens—they are already there. The cursor automatically advances to the next prompt, School Year (Schl Yr).
- Step 4: The **School Year** field is prepopulated with the current year. Press **ENTER** to populate the screen with the student's information.

Notes:



RC05	FAT Summary Part 2(P2)	Loan Detail(LD)	Aggregate Detail(AD)
	Overpayment Summary(OS)	Name Hist(NH)	Attendance Hist(AH)
NSLDS		03-02-1998	
Financial Aid Transcript Summary Part 1		12:15:50	
SSN..043906703 First Name..TARA MARIE__ DOB..02-16-1975 Schl Yr..1998			
Curr SSN: 043906703 Last Name: NUNEZ Name Hist: Y			
For Overpayment Summary Info make a selection (S) and press ENTER			
Sel	Overpayment	Contact	Defaulted Loans..... N Discharged.....: N
	Pell.....: N	N/A	Loan Sat. Repayment: N Active Bankruptcy: N
	FSEOG....: N	N/A	
	Perkins.: N	N/A	Perkins Cumulative Loan Amount...: \$4,500
For Aggregate Detail make a selection (S) and press ENTER			
Aggregate Amount for FFELP/Direct Loans			
- Subsidized Loans			
	Outstanding Prin. Bal.:	\$14,375	Pending Disb: \$ N/A Total: \$14,375
Unsubsidized Loans			
	Outstanding Prin. Bal.:	\$ N/A	Pending Disb: \$ N/A Total: \$ N/A
Consolidated Loans			
	Outstanding Prin. Bal.:	\$ N/A	Total: \$ N/A
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT			

RC05 Financial Aid Transcript Summary Part 1 (Populated)

The screen is now populated with the following information from the NSLDS database:

- ◆ Overpayment indicators for Pell, FSEOG, and Perkins —Y, N, or S, where S means satisfactory arrangement made—with contact information if applicable
- ◆ Defaulted Loans indicator (Y or N)
- ◆ Discharged Loans indicator (Y or N)
- ◆ Loan Satisfactory Repayment indicator (Y or N)
- ◆ Active Bankruptcy indicator (Y or N)
- ◆ Perkins Cumulative Loan Amount

63

- ◆ Aggregate Loan Amounts for subsidized, unsubsidized, and consolidated loans

Notes:



When the screen is populated, the prompt automatically advances to the **action bar** at the top of the screen. Entering an **action code** on the action bar will take you to another screen. On this screen, the following action codes are shown:

P2 takes you to the *RC5A Financial Aid Transcript Summary Part 2* screen.

LD takes you to the *RC06 Loan Detail* screen.

AD takes you to the *RC06 Aggregate Detail* screen.

OS takes you to the *RC1D Aid Overpayment Summary* screen.

NH takes you to the *RC08 Name History* screen.

AH takes you to the *RC0A School Attendance History* screen.

Financial Aid Transcript Summary Part 2

To access the *RC5A Financial Aid Transcript Summary Part 2* screen from the populated *RC05 Financial Aid Transcript Summary Part 1* screen:

Step 1: Type **P2** on the action bar.

Step 2: Press **ENTER**.

RC05	P2	FAT Summary Part 2(P2)	Loan Detail(LD)	Aggregate Detail(AD)
		Overpayment Summary(OS)	Name Hist(NH)	Attendance Hist(AH)

NSLDS	03-02-1998
Financial Aid Transcript Summary Part 1	12:15:51

SSN	RC5A	Loan Detail(LD)	Name History(NH)	Attendance History(AH)
-----	------	-----------------	------------------	------------------------

NSLDS	03-02-1998
Financial Aid Transcript Summary Part 2	12:15:52

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Schl Yr...: 1998
 Curr SSN: 043906703 Last Name.: NUNEZ Name Hist: Y

Perkins Loans
 Cumulative Loan Amount.....: \$4,500 Current Year Loan Amount: \$ N/A
 First Disb. Prior to 10-01-1992: N Expanded Lending Option.: N

1997-98 Pell Payment Data MORE:

School Code:	School Name:	
Tran.....:	Sch. Amt....:	Disb. Amt.:
Rem. Amt.:	% Sch. Used:	As of.....:

School Code:	School Name:	
Tran.....:	Sch. Amt....:	Disb. Amt.:
Rem. Amt.:	% Sch. Used:	As of.....:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC5A Financial Aid Transcript Summary Part 2

The system populates this screen with the following student information:

- ◆ Perkins Loan cumulative loan amount
- ◆ Perkins Loan current school year loan amount
- ◆ First disbursement prior to 10/1/92 (Y or N)
- ◆ Expanded Lending Option (Y or N)
- ◆ Pell Payment Data (maximum of two records)

You can navigate to the *Loan Detail (LD)*, *Name History (NH)*, and *Attendance History (AH)* screens by entering the appropriate action code on the action bar at the top of the screen. (You can also navigate to those screens from the *RC05 Financial Aid Transcript Summary Part 1* screen.)

Loan Detail

To view detailed information on the student's Perkins Loans, Federal Family Education Loans, and Direct Loans:

Step 1: Type **LD** on the action bar.

Step 2: Press **ENTER**.

Notes:



RC05 ☒ LD FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
Financial Aid Transcript Summary Part 1 12:15:53

RC06 — GA/School Information(GS)

NSLDS 03-02-1998
Loan Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:15:54

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code Type
FFEL STAFFORD SUB	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204 LNS
Status Cd ID as of		09-03-1996	Outst Bal. \$ 2,750 as of		08-13-1996	Acad Lvl: 3
FFEL STAFFORD SUB	\$ 5,500	08-29-1995	05-16-1996	733	00258900	827288 LEN
Status Cd ID as of		08-29-1995	Outst Bal. \$ 5,500 as of		09-30-1995	Acad Lvl: 3
FFEL STAFFORD SUB	\$ 1,750	01-18-1995	05-18-1995	733	00258900	700043 LNS
Status Cd ID as of		01-18-1995	Outst Bal. \$ 1,750 as of		06-30-1996	Acad Lvl: 2
FFEL STAFFORD SUB	\$ 1,750	09-05-1994	05-13-1995	733	00257200	700043 LNS
Status Cd ID as of		09-05-1994	Outst Bal. \$ 1,750 as of		06-30-1996	Acad Lvl: 2

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

Navigation Schematic for RC06 Loan Detail

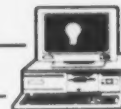
The RC06 Loan Detail screen has the following information:

- ◆ types of loans,
- ◆ loan amount,
- ◆ loan begin and end dates,
- ◆ guaranty agency and school codes,
- ◆ contact code and type,
- ◆ status code,
- ◆ outstanding principal balance, and
- ◆ academic level for loan period.

The contact codes are as follows:

- ♦ SCH—school
- ♦ LEN—lender
- ♦ LNS—lender's servicer
- ♦ DLS—Direct Loan Servicer
- ♦ EDR—ED region
- ♦ GA—guaranty agency
- ♦ SCS—school servicer
- ♦ N/A—not applicable

Notes:



There is a "+" sign in the MORE field, so press F8 to view more loan information.

RC06 — GA/School Information(GS)							
NSLDS							03-02-1998
Loan Detail By Loan Begin Date, Outstanding Bal. (Descending)							12:15:55
SSN.....: 043906703		First Name: TARA MARIE		DOB: 02-16-1975		Name Hist: Y	
Curr SSN: 043906703		Last Name.: NUNEZ				MORE: -	
Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
- FFEL STAFFORD SUB	\$ 2,625	09-07-1993	05-14-1994	733	00257200	700043	LNS
Status Cd ID as of		09-07-1993		Outst Bal. \$ 2,625 as of		06-30-1996 Acad Lvl: 1	
- FEDERAL PERKINS	\$ 4,500	07-01-1993	06-30-1995	N/A	00257200	00257200	SCH
Status Cd DA as of		01-18-1995		Outst Bal. \$ 4,500 as of		09-01-1994 Acad Lvl: N	
Status Cd	as of	Outst Bal.		as of		Acad Lvl:	
Status Cd	as of	Outst Bal.		as of		Acad Lvl:	
PRIVACY ACT OF 1974 (AS AMENDED)							
F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER							

RC06 Loan Detail (cont'd)

From the RC06 Loan Detail screen, you can access the status code list and select the information sort order. Press F9 to view the first screen of status codes. Press F8 to see the remaining codes.

73

RC5B		
NSLDS		03-02-1998
Status Code List		12:15:56
		MORE: +
Status Code	Description	
AE	ASSIGNED TO U.S. DEPARTMENT OF EDUCATION	
BC	BANKRUPTCY CLAIM, DISCHARGED	
BK	BANKRUPTCY CLAIM, ACTIVE	
CA	CANCELLED	
DA	DEFERRED	
DB	DEFAULTED, THEN BANKRUPT, ACTIVE, CHAPTER 13	
DC	DEFAULTED, COMPROMISE	
DD	DEFAULTED, THEN DIED	
DE	DEATH	
DI	DISABILITY	
DK	DEFAULTED, THEN BANKRUPT, DISCHARGED, CHAPTER 13	
DL	DEFAULTED, IN LITIGATION	
DO	DEFAULTED, THEN BANKRUPT, ACTIVE, OTHER	
DP	DEFAULTED, PAID IN FULL	
F3=EXIT F7=BACKWARD F8=FORWARD		

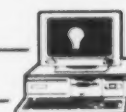
RC5B Status Code List (1 of 2)

RC5B		
NSLDS		03-02-1998
Status Code List		12:15:57
		MORE: -
Status		
Code	Description	
DS	DEFAULTED, THEN DISABLED	
DT	DEFAULTED, COLLECTION TERMINATED	
DU	DEFAULTED, UNRESOLVED	
DW	DEFAULTED, WRITE-OFF	
DX	DEFAULTED, SIX CONSECUTIVE PAYMENTS	
FB	FORBEARANCE	
ID	IN SCHOOL OR GRACE PERIOD	
OD	DEFAULTED, THEN BANKRUPT, DISCHARGED, OTHER	
PC	PAID IN FULL THROUGH CONSOLIDATION LOAN	
PF	PAID IN FULL	
RF	REFINANCED	
RP	IN REPAYMENT	
UI	UNREINSURED	
F3=EXIT F7=BACKWARD F8=FORWARD		

74
RC5B Status Code List (2 of 2)

Press **F3** to return to the populated *RC06 Loan Detail* screen. Now press **F10** to view the *RC5C Sort Order Selection* screen.

Notes: _____



RC5C

NSLDS
Sort Order Selection

03-02-1998
12:15:58

Make a selection (S) and press ENTER

Sel Sort Order

- By Contact
- By Defaulted/Non-Defaulted
- By Loan Begin Date, Outstanding Bal. (Descending)
- By Loan Type
- By Outstanding Bal. (Descending)
- By Status Code

F3=EXIT

RC5C Sort Order Selection

To change the order in which the loans are listed on the *RC06 Loan Detail* screen, use the *RC5C Sort Order Selection* screen as follows:

Step 1: **TAB** to the desired sort order.

Step 2: Type **S** next to the desired sort order.

As an example, select "By Outstanding Bal. (Descending)."

Step 3: Press **ENTER**.

The *RC06 Loan Detail* screen will display the loans sorted in the order you selected.

Step 4: There is a "+" sign in the MORE field, so press **F8** to see the next screen.

RC06 — GA/School Information(GS)

NSLDS 03-02-1998
 Loan Detail By Outstanding Bal. (Descending) 12:15:59

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
 Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
FFEL STAFFORD SUB	\$ 5,500	08-29-1995	05-16-1996	733	00258900	827288	LEN
Status Cd ID as of 08-29-1995 Outst Bal. \$ 5,500 as of 09-30-1995 Acad Lvl: 3							
FEDERAL PERKINS	\$ 4,500	07-01-1993	06-30-1995	N/A	00257200	00257200	SCH
Status Cd DA as of 01-18-1995 Outst Bal. \$ 4,500 as of 09-01-1994 Acad Lvl: N							
FFEL STAFFORD SUB	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204	LNS
Status Cd ID as of 09-03-1996 Outst Bal. \$ 2,750 as of 08-13-1996 Acad Lvl: 3							
FFEL STAFFORD SUB	\$ 2,625	09-07-1993	05-14-1994	733	00257200	700043	LNS
Status Cd ID as of 09-07-1993 Outst Bal. \$ 2,625 as of 06-30-1996 Acad Lvl: 1							

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

RC06 Loan Detail—Sorted by Outstanding Balance (Descending)—1 of 2

RC06 — GA/School Information(GS)

NSLDS 03-02-1998
 Loan Detail By Outstanding Bal. (Descending) 12:16:00

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
 Curr SSN: 043906703 Last Name.: NUNEZ MORE: -

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
FFEL STAFFORD SUB	\$ 1,750	01-18-1995	05-18-1995	733	00258900	700043	LNS
Status Cd ID as of 01-18-1995 Outst Bal. \$ 1,750 as of 06-30-1996 Acad Lvl: 2							
FFEL STAFFORD SUB	\$ 1,750	09-05-1994	05-13-1995	733	00257200	700043	LNS
Status Cd ID as of 09-05-1994 Outst Bal. \$ 1,750 as of 06-30-1996 Acad Lvl: 2							
Status Cd	as of	Outst Bal.	as of			Acad Lvl:	
Status Cd	as of	Outst Bal.	as of			Acad Lvl:	

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

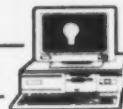
RC06 Loan Detail—Sorted by Outstanding Balance (Descending)—2 of 2

Aggregate Detail

To view the aggregate detail for a specific loan type:

- Step 1: Press **F3** once or twice as necessary to return the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 2: Type **AD** on the action bar of the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 3: Click with your mouse on the selection bar next to the desired loan type in the Aggregate Detail section of the screen, and type **S**. As an example, select "Subsidized Loans."
- Step 4: Press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen, which displays the loans that make up the aggregate loan amount.

Notes:



RC05 ☒ AD FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
Financial Aid Transcript Summary Part 1 12:16:01

SSN..043906703 First Name..TARA MARIE__ DOB..02-16-1975 Schl Yr..1998
Curr SSN: 043906703 Last Name: NUNEZ Name Hist: Y
For Overpayment Summary Info make a selection (S) and press ENTER
Sel Overpayment Contact Defaulted Loans..... N Discharged..... N
Pell..... N N/A Loan Sat. Repayment: N Active Bankruptcy: N
FSEOG.... N N/A
Perkins.. N N/A Perkins Cumulative Loan Amount... \$4,500

For Aggregate Detail make a selection (S) and press ENTER

Aggregate Amount for FFELP/Direct Loans

☒ S Subsidized Loans

Outstanding Prin. Bal.: \$14,375 Pending Disb: \$ N/A Total: \$14,375

RC06 — GA/School Information(GS)

NSLDS 03-02-1998
Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:16:01

SSN..... 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
F3= Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
FFEL STAFFORD SUB	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204	LNS
Status Cd ID as of 09-03-1996 Outst Bal. \$ 2,750 as of 08-13-1996 Acad Lvl: 3							
FFEL STAFFORD SUB	\$ 5,500	08-29-1995	05-16-1996	733	00258900	827288	LEN
Status Cd ID as of 08-29-1995 Outst Bal. \$ 5,500 as of 09-30-1995 Acad Lvl: 3							
FFEL STAFFORD SUB	\$ 1,750	01-18-1995	05-18-1995	733	00258900	700043	LNS
Status Cd ID as of 01-18-1995 Outst Bal. \$ 1,750 as of 06-30-1996 Acad Lvl: 2							
FFEL STAFFORD SUB	\$ 1,750	09-05-1994	05-13-1995	733	00257200	700043	LNS
Status Cd ID as of 09-05-1994 Outst Bal. \$ 1,750 as of 06-30-1996 Acad Lvl: 2							

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

Navigation Schematic for RC06 Aggregate Detail—1 of 2

There is a "+" sign in the MORE field, so press **F8** to see the next part of the **RC06 Aggregate Detail** screen.

Notes:



```

RC06      GA/School Information(GS)
-----
                                NSLDS
Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending)
                                03-02-1998
                                12:16:01

SSN.....: 043906703  First Name: TARA MARIE  DOB: 02-16-1975  Name Hist: Y
Curr SSN: 043906703  Last Name.: NUNEZ                                MORE: -

Loan Detail          Loan      Loan      Loan      GA      School  --Contact---
                   Amount     Begin     End      Code     Code     Code    Type
- FFEL STAFFORD SUB  $ 2,625  09-07-1993  05-14-1994  733  00257200  700043  LNS
Status Cd ID as of 09-07-1993  Outst Bal. $ 2,625 as of 06-30-1996  Acad Lvl: 1

Status Cd   as of                Outst Bal.                as of                Acad Lvl:

Status Cd   as of                Outst Bal.                as of                Acad Lvl:

Status Cd   as of                Outst Bal.                as of                Acad Lvl:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F9=STATUS CODE LIST  F10=SELECT SORT ORDER

```

RC06 Aggregate Detail—2 of 2

Guaranty Agency and School Information

The RC07 GA/School Information screen allows you to view guaranty agency and school information for the loan you select.

As an example, to find which guaranty agency guaranteed the student's most recent subsidized loan:

Step 1: Press **F7** to go back to the *RC06 Aggregate Detail* screen with the most recent loans.

Step 2: Type **GS** on the action bar.

79

Step 3: In the list of loans, type **S** to select the first loan.

Notes:



Step 4: Press **ENTER**. This brings you to the **RC07 GA/School Information** screen.

RC06

GS

GA/School Information(GS)

NSLDS

03-02-1998

Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending)

12:16:02

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y

Curr SSN: 043906703 Last Name.: NUNEZ

MORE: +

Loan Detail

Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact--- Code	Type
-------------	------------	----------	---------	-------------	-------------------	------

S FFEL STAFFORD SUB \$ 5,500 09-03-1996 05-22-1997 733 00258900 700204 LNS
Status Cd ID as of 09-03-1996 Outst Bal. \$ 2,750 as of 08-13-1996 Acad Lvl: 3

RC07 Organization Contact(OC)

NSLDS

03-02-1998

GA/School Information

12:16:03

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975

Last Name: NUNEZ

Originating School Information

School/Branch Code: 00258900

F3 Name.....: UNIVERSITY OF NEW HAMPSHIRE

Street Address.....: MAIN STREET

City.....: DURHAM

State: NH Zip Code: 03824

Current GA Information

GA Code.....: 733 Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.

Street Address.....: P.O. BOX 877

City.....: CONCORD

State: NH Zip Code: 033020000

Resp Begin date....:

PRIVACY ACT OF 1974 (AS AMENDED)

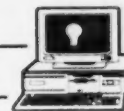
F3=EXIT

Navigation Schematic for RC07 GA/School Information

80

Name History

Notes:



To view a student's name history:

Step 1: Press **F3** twice to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.
Check this screen to see if NSLDS has name history information on the student. If it does, there will be a "Y" next to "Name Hist" in the upper right-hand portion of the screen.

Step 2: Type **NH** on the action bar and press **ENTER**. This will bring you to the *RC08 Name History* screen.

RC05	NH	FAT Summary Part 2(P2)	Loan Detail(LD)	Aggregate Detail(AD)
		Overpayment Summary(OS)	Name Hist(NH)	Attendance Hist(AH)

NSLDS	03-02-1998
Financial Aid Transcript Summary Part 1	12:16:04

SSN..043906703	First Name..TARA MARIE__	DOB..02-16-1975	Schl Yr..1998
Curr SSN: 043906703	Last Name: NUNEZ	Name Hist: Y	

For
Sel

RC08

NSLDS	03-02-1998
Name History	12:16:05

For	SSN.....: 043906703	First Name: TARA MARIE	DOB: 02-16-1975
Agg	Current SSN: 043906703	Last Name.: NUNEZ	

MORE:

First	M	Last
TARA MARIE	M	NUNEZ
TARA	M	SEARLES

F3=

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC08 Name History

81

The *RC08 Name History* screen is used to correctly identify a student by displaying a history of all names used by the student on data submitted to NSLDS. Access to the *Name History* screen is only available if NSLDS contains more than one name for the student.

Notes:



School Attendance History

To view a student's attendance history:

- Step 1: Press **F3** to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 2: Type **AH** on the action bar and press **ENTER**. This brings you to the *RC0A School Attendance History* screen.

RC05 ☒ AH FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:16:06

RC0A

NSLDS 03-02-1998
 School Attendance History 12:16:07

Student Name: TARA MARIE NUNEZ SSN: 043906703
 MORE:

Sch/Br Code: 00257200 Name: COLBY SAWYER COLLEGE
 Street Address: 100 MAIN STREET
 City.....: NEW LONDON State: NH Zip Code: 03257

Sch/Br Code: 00258900 Name: UNIVERSITY OF NEW HAMPSHIRE
 Street Address: MAIN STREET
 City.....: DURHAM State: NH Zip Code: 03824

Sch/Br Code: Name:
 Street Address:
 City.....: State: Zip Code:

Sch/Br Code: Name:
 Street Address:
 City.....: State: Zip Code:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC0A School Attendance History

The RC0A School Attendance History screen lists schools in order of student attendance, with the school most recently attended listed first. The screen information includes:

- ◆ school branch code,
- ◆ school name, and
- ◆ school address.

A school will be listed only if the student obtained Title IV aid at the school that has been reported to NSLDS or if the school submitted an SSCR including information on that student.

AID OVERPAYMENT

NSLDS's overpayment function allows schools online access to view and update Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), and Federal Perkins Loan overpayments.

There are **two methods** of accessing overpayment data:

1. Through NSLDS's **Financial Aid Transcript Summary** function: From the *Financial Aid Transcript Summary Part 1* screen, type **OS** on the action bar and press **ENTER**. This method is **view only**.
2. Through NSLDS's **Aid Overpayment** function: From the *SS04 NSLDS Main Menu*, type **2** (*RC00 Reporting Capabilities Main Menu*) and press **ENTER**. Then type **7** (*Aid Overpayment*) and press **ENTER**. With this method, you can **submit data directly to NSLDS**.

Notes:



Aid Overpayment Summary (View Only)

To access overpayment summary information about a different student:

Step 1: Press **F3** to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.

Step 2: Press **F3** to reach the *RC00 Reporting Capabilities Main Menu* screen. Type **5** (*Financial Aid Transcript Summary*) and press **ENTER**. This is the best way to obtain an unpopulated *FAT Summary Part 1* screen ready for inputting another student's data.

Step 3: On the *RC05 FAT Summary Part 1* screen, type the **SSN**, **first name**, and **DOB** for Alycia P. Renee as follows:

- SSN: 444 44 4444
- First name: Alycia
- DOB: 01-17-1968

Step 4: Press **ENTER** to populate the screen for Alycia.

Notes:



RC05 ☒ OS FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
Financial Aid Transcript Summary Part 1 12:16:06

SSN..444444444 First Name..ALYCIA_____ DOB..01-17-1968 Schl Yr..1998
Curr SSN: 444444444 Last Name: RENEE Name Hist: N
For Overpayment Summary Info make a selection (S) and press ENTER
Sel Overpayment Contact Defaulted Loans..... N Discharged..... N
☒ S Pell..... Y 00104500 Loan Sat. Repayment: N Active Bankruptcy: N
FSEOG.... S 00104500
Perkins.: Y 01135900 Perkins Cumulative Loan Amount... \$ N/A

F3 RC1D — Overpayment Detail(OD)
Ag

NSLDS 03-02-1998
PELL Aid Overpayment Summary 12:16:08

School Code: 00104500 School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 444444444 Name: ALYCIA P RENEE DOB: 01-17-1968
MORE:
Sel Disbursement Date Type Ovrpmt Date Repaid School/Br Source Reg Inact
(MM - DD - CCYY) Indr (MM - DD - CCYY) Code Code Flg
F3 — 09 - 12 - 1997 PE Y 00104500 SCH
— 01 - 26 - 1998 PE R 01 - 26 - 1998 00104500 SCH

Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),
Satisfactory arrangement made (S)
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC1D Aid Overpayment Summary

The RC05 Financial Aid Transcript Summary Part 1 screen shows that NSLDS has overpayment data for Pell (Overpayment Indicator "Y"), for FSEOG (Overpayment Indicator "S"), and for Perkins (Overpayment Indicator "Y").

To display the Pell overpayment data:

Step 1: Type OS on the action bar.

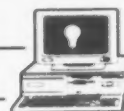
Step 2: Type S on the Pell selection bar.

Step 3: Press ENTER. The Pell Aid Overpayment Summary screen appears.

There are separate *RC1D Aid Overpayment Summary* screens for Pell, FSEOG, and Perkins. The screens indicate if a student:

- ♦ owes an overpayment,
- ♦ no longer owes an overpayment, or
- ♦ has made satisfactory arrangements to repay overpayments.

Notes:



Aid Overpayment Detail Information

Notes:



NSLDS has detailed information about each overpayment. To access the *RCON Aid Overpayment Detail Information* screen:

- Step 1: Type **OD** on the action bar of the *RCID Aid Overpayment Summary* screen.
- Step 2: Type **S** on the selection bar for the desired record. As an example, select the first Pell overpayment.
- Step 3: Press **ENTER**. This will bring you to the *RCON Aid Overpayment Detail Information* screen.

RCON		Organization Contact (OC)	
		NSLDS	03-02-1998
		Aid Overpayment Detail Information	12:16:10
School Code: 00104600	School Name: STONEWALL JACKSON STATE JUNIOR		
SSN: 444444444	Name: ALYCIA	P RENEE	DOB: 01-17-1968
Disbursement Date: 09-12-1997	Inactive Flag: (Y=Inactive, Blank=Active)		
Overpayment Type: PE	Create Date: 03-01-1998		
Overpayment Indicator: Y	Update Date:		
Date Repaid:			
Source: SCH			
ED Region:			
Originating School Information			
School/Branch Code: 00104500			
Name: STONEWALL JACKSON STATE JUNIOR COL			
Street Address:			
City: RAINSVILLE	State: AL	Zip Code: 35986	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT			

RCON Aid Overpayment Detail Information

The *RCON Aid Overpayment Detail Information* screen displays:

- ♦ create date (the date that the record was created),
- ♦ update date (the date that the record was updated),
- ♦ inactive flag, and
- ♦ originating school information (school code, name, and address).

Notes:

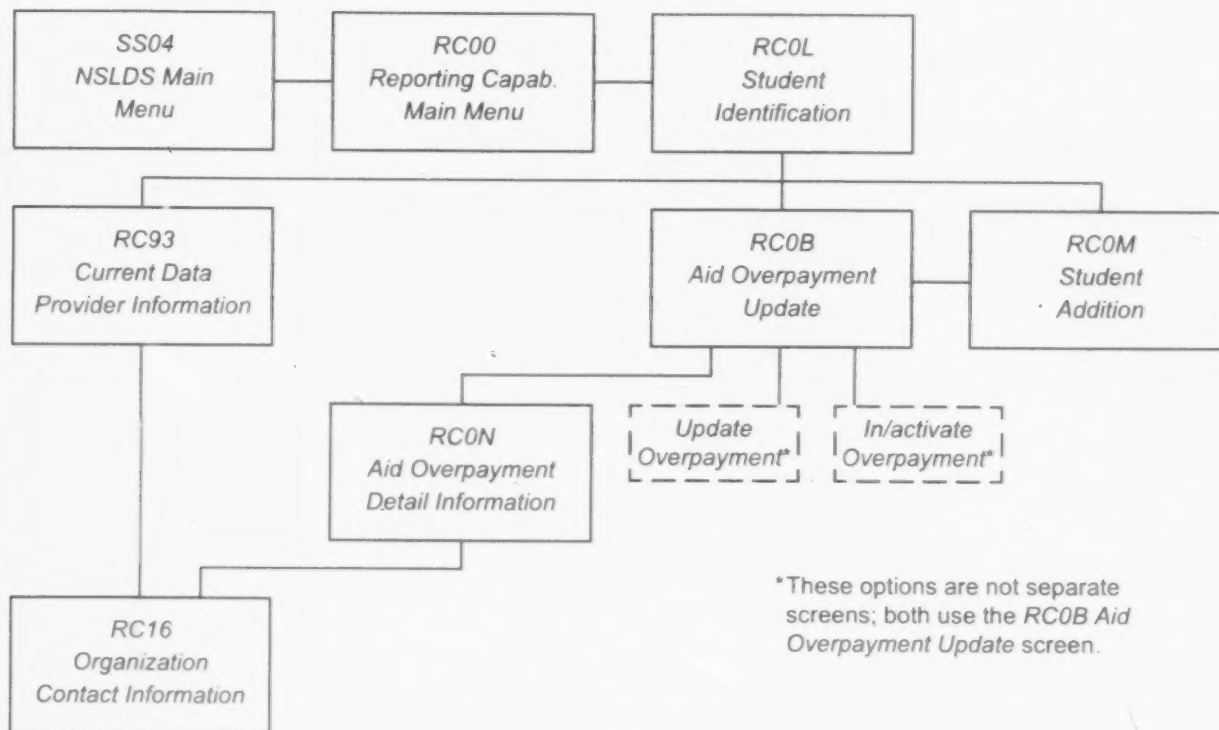


Accessing Aid Overpayment Screens Through NSLDS's *Aid Overpayment Function*

This method of accessing overpayment information allows you to submit student data to NSLDS.

Online Screen Navigation

The next page shows a "map" of the screens included in NSLDS's Aid Overpayment function. Please pull out this page for reference during the rest of the session.



Map of NSLDS's Aid Overpayment Function

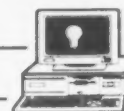
You access the Aid Overpayment function from the *RC00 Reporting Capabilities Main Menu* screen.

- ◆ If you had just started NSLDS, and you were at the *SS04 NSLDS Main Menu* screen, you would type **2** and press **ENTER** to reach the *RC00 Reporting Capabilities Main Menu* screen.
- ◆ If you were already in another functional area of NSLDS, such as the *FAT Summary* screens, you would press **F3** until you returned to the *RC00 Reporting Capabilities Main Menu* screen.

Step 1: Type **7** (*Aid Overpayment*).

Step 2: Press **ENTER**. This would bring you to the unpopulated *RCOL Student Identification* screen.

Notes:



SS04

NSLDS 03-02-1998
NSLDS Main Menu 12:16:11

Input the number of your choice and press ENTER.

- ☐ 2
1. System Support Main Menu
 2. Reporting Capabilities Main Menu

RC00

NSLDS 03-02-1998
Reporting Capabilities Main Menu 12:16:12

Input the number of your choice and press ENTER.

- ☐ 7
1. Aggregate Inquiry Main Menu
 2. Default Rate Main Menu
 3. Report Selection Menu
 4. Borrower Tracking Security
 5. Financial Aid Transcript Summary
 6. Student Status Confirmation Menu
 7. Aid Overpayment

RC0L __ Data Provider Info(DP) Overpayment Update(OU) Add Student(AS)

NSLDS 03-02-1998
Student Identification 12:16:13

SSN. _____ First Name. _____ DOB. __ - __ - ____ (MM-DD-CCYY)

NAME HISTORY

First	M	Last	DOB	State	Curr SSN
-------	---	------	-----	-------	----------

PRIVACY ACT OF 1974 (AS AMENDED)

RC0B46-I: Please input search criteria for Student and press Enter

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC0L Student Identification

Student Identification

Notes: _____



To populate the screen, you would:

Step 1: Type the student's **SSN**, **first name**, and **DOB**.Step 2: Press **ENTER**.

RCOL	___	Data Provider Info(DP)	Overpayment Update(OU)	Add Student(AS)
		NSLDS		03-02-1998
		Student Identification		12:16:14
SSN..444444444	First Name..ALYCIA_____	DOB..01 - 17 - 1968	(MM-DD-CCYY)	
NAME HISTORY				
First	M	Last	DOB	State
ALYCIA	P	RENEE	01-17-1968	444444444
CURR SSN				
444444444				
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT F7=BACKWARD F8=FORWARD				

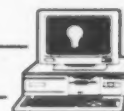
RCOL Student Identification (Populated)

The *RCOL Student Identification* screen is the highest level for the Aid Overpayment function. The action codes you see depend on your access authority.

You use this screen to determine whether the overpayment you are entering is for a student already in NSLDS, or if you need to add the student before entering his/her overpayment information.

Current Data Provider Information

Notes:



To access current data provider information:

Step 1: Type **DP** on the *RCOL Student Identification* action bar.

Step 2: Press **ENTER**. This will bring you to the *RC93 Current Data Provider Information* screen.

```

RC93  —  Organization Contact(OC)
-----
                                NSLDS                      03-02-1998
                                Current Data Provider Information  12:16:15

Student/Borrower Name: GREGORY      T COLLINS      SSN: 043865160
                                MORE:
- GA Code.....: 725      Name: AMERICAN STUDENT ASSISTANCE
  Street Address.....: 330 STUART STREET
  City.....: BOSTON      State: MA  Zip Code: 021165292
  Resp Begin Date....: 09-04-1991

- School/Branch Code.: 00214600  Name: EMERSON COLLEGE
  Street Address.....: 100 BEACON STREET
  City.....: BOSTON      State: MA  Zip Code: 02116

                                Name:
  Street Address.....:
  City.....:      State:      Zip Code:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC93 Current Data Provider Information

The *RC93 Current Data Provider Information* screen lists the data providers that submitted information on the student.

- ◆ The screen includes guaranty agency, Federal Direct Loan servicer, or school name and address.

94

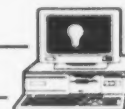
To determine who to contact to resolve conflicting information, you would:

Step 1: Type **OC** on the *RC93 Current Data Provider Information* action bar.

Step 2: **TAB** to the desired data provider and type **S** to select it.

Step 3: Press **ENTER** to display the *Organization Contact Information* screen.

Notes:



Student Addition

To enter overpayment information for a student who is not yet included in the NSLDS database, you must first add the student to NSLDS.

On the *RCOL Student Identification* screen, to add a student you would:

Step 1: Type the student's **SSN**, **first name**, and **date of birth**.

Step 2: Type **AS** (Add Student) on the action bar.

Step 3: Press **ENTER**. This brings you to the *RCOM Student Addition* screen.

RC0L **AS** Data Provider Info(DP) Overpayment Update(OU) Add Student(AS)

NSLDS	03-02-1998
Student Identification	12:16:13

SSN.. **578967890** First Name.. **Thomas** DOB.. **05 - 24 - 1978** (MM-DD-CCYY)

RCOM ____ Add student Overpayment(AO)

F1	NSLDS	03-02-1998
	Student Addition	12:16:16

Social Security Number . : 578967890
 Last Name : _____
 First Name : THOMAS_____
 Middle Initial : _____
 Date of Birth : 05 - 24 - 1978 (MM-DD-CCYY)

PRIVACY OF ACT OF 1974 (AS AMENDED)

F3=EXIT

RCOM Student Addition

The *Student Addition* screen displays the data you just entered and collects optional information for the new student record in NSLDS.

To continue the process of adding the new student, you would:

Step 4: Type **AO** on the action bar of the *Student Addition* screen.

Step 5: Type the optional information if you have it—**last name** and **middle initial**.

Step 6: Press **ENTER**.

Aid Overpayment Update

Notes: _____



The new record for the student you are adding will only be created if an overpayment is now entered on the *RC0B Aid Overpayment Update* screen. This screen is shown below.

RC0B — Overpymt Detail(OD) Update Overpymt(UO) In/activate Overpymt(IO)									
NSLDS								03-02-1998	
Aid Overpayment Update								12:16:17	
School Code: 00104500				School Name: STONEWALL JACKSON STATE JUNIOR					
SSN: 578967890				Name: THOMAS R JOHNSON				DOB: 05-24-1978	
MORE:									
Sel	Disbursement	Date	Type	Ovrpmt	Date Repaid	School/Br	Source	Reg	Inact
	(MM - DD - CCYY)			Indr	(MM - DD - CCYY)	Code		Code	Flg
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)									
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),									
Satisfactory arrangement made (S)									
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)									
PRIVACY ACT OF 1974 (AS AMENDED)									
RC0B38-I: When an overpayment is added, student will also be added.									
F3=EXIT F7=BACKWARD F8=FORWARD									

RC0B Aid Overpayment Update

To enter overpayment information for the student you are adding, you would:

Step 1: Type **UO** (Update Overpayment) on the action bar.

Step 2: Type **S** in the Select column on the first line.

Step 3: Type the Disbursement Date.

Step 4: Key in the code for the type of aid—PE for Pell, SE for FSEOG, or PK for Perkins.

Step 5: Key in the Overpayment Indicator.

Notes:



Step 6: Key in the Date Repaid, if applicable, or leave this field blank to show that the overpayment has not been repaid.

Note: There is no need to key in the School/Branch Code—your school code will be entered as the default if you leave this field blank. Similarly, the Source can be left blank—SCH (School) will be entered for you.

The RC0B Aid Overpayment Update screen at this point, before pressing **ENTER**, is shown below.

RC0B <u>UO</u> Overpymt Detail(OD) Update Overpymt(UO) In/activate Overpymt(IO)									
NSLDS								03-02-1998	
Aid Overpayment Update								12:16:18	
School Code: 00104500				School Name: STONEWALL JACKSON STATE JUNIOR					
SSN: 578967890 Name: THOMAS				R JOHNSON		DOB: 05-24-1978			
MORE: +									
Sel	Disbursement	Date	Type	Ovrpmt	Date Repaid	School/Br	Source	Reg	Inact
	(MM - DD - CCYY)			Indr	(MM - DD - CCYY)	Code		Code	Flg
S	02	13	1998	PK	Y				
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)									
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),									
Satisfactory arrangement made (S)									
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)									
PRIVACY ACT OF 1974 (AS AMENDED)									
RC0B38-I: When an overpayment is added, student will also be added.									
F3=EXIT F7=BACKWARD F8=FORWARD									

RC0B Aid Overpayment Update—Entering an Overpayment for an Added Student

When you press **ENTER**, your school code and the source SCH would appear automatically in the appropriate fields, and you would see the message "Aid Overpayment added successfully; Press enter to clear."

You would press **ENTER** once more to clear this message and add the student and the overpayment as a new record in NSLDS.

Aid Overpayment Updates for Students Already in NSLDS

The *RCOB Aid Overpayment Update* screen lets you:

- ◆ add new overpayments,
- ◆ report that overpayments have been repaid or that satisfactory arrangements have been made,
- ◆ indicate that overpayments have been referred to ED, and
- ◆ activate or deactivate overpayments.

For a student already in NSLDS, you would begin on the *RCOL Student Identification* screen. You would:

- Step 1: Enter the student's **SSN**, **first name**, and **DOB**.
- Step 2: Type **OU** (Overpayment Update) on the action bar.
- Step 3: Press **ENTER**. The *RCOB Aid Overpayment Update* screen would then appear. A sample screen for a student who has existing overpayments is shown on the next page.

Notes:



RCOB — Overpymt Detail(OD) Update Overpymt(UO) In/activate Overpymt(IQ)									
NSLDS								03-02-1998	
Aid Overpayment Update								12:16:19	
School Code: 00100700				School Name: CENTRAL ALABAMA COMMUNITY COLLEGE					
SSN: 008562803				Name: JEFFREY DOWLING				DOB: 07-07-1979	
MORE: +									
Sel	Disbursement	Date	Type	Ovrpmt	Date Repaid	School/Br	Source	Reg	Inact
	(MM - DD - CCYY)			Indr	(MM - DD - CCYY)	Code		Code	Flg
-	05 - 07 - 1995		PK	Y	00 - 00 - 0000	00100700	SCH	—	—
-	04 - 04 - 1994		PE	Y	00 - 00 - 0000	00122600	SCH	—	—
-	01 - 01 - 1996		SE	Y	00 - 00 - 0000	00122600	SCH	—	—
-	06 - 06 - 1996		SE	R	07 - 07 - 1996	00122600	SCH	—	—
-	— - — - —		—	—	— - — - —	—	—	—	—
-	— - — - —		—	—	— - — - —	—	—	—	—
Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)									
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),									
Satisfactory arrangement made (S)									
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)									
PRIVACY ACT OF 1974 (AS AMENDED)									
F3=EXIT F7=BACKWARD F8=FORWARD									

RCOB Aid Overpayment Update for Student Already in NSLDS

If a Student Owes an Overpayment

To enter an overpayment:

Step 1: Type **UO** on the action bar.

Step 2: **TAB** to the first blank line and type **S**.

Step 3: Type the following data:

- **disbursement date**,
- **code** for type of overpayment (listed at the bottom of the screen), and
- **Y** in the Overpayment Indicator field.

Step 4: Press **ENTER**. You'll see the message "Aid Overpayment added successfully; Press enter to clear."

Step 5: Press **ENTER** again to clear this message and add the overpayment.

If a Student Has Repaid an Overpayment

Notes:



To indicate that a student no longer owes a repayment:

Step 1: Type **UO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Type **R** for "Repaid" in the Overpayment Indicator field.

Step 4: Type the **date repaid** in the Date Repaid field.

Step 5: Press **ENTER**.

If a Student Makes Satisfactory Repayment Arrangements

To indicate that a student has made satisfactory repayment arrangements:

Step 1: Type **UO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Type **S** for "Satisfactory arrangement made" in the Overpayment Indicator field.

Step 4: Press **ENTER**.

If a Student's Overpayment Has Been Referred to ED

To indicate that a student's overpayment has been referred to ED:

Step 1: Type **UO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Type **TRF** for "Transfer to/from ED" in the Source field.

Notes:



Step 4: Press **ENTER**.

Once ED has accepted the referral, ED will update the Source field to **EDR** and you will no longer be able to update the record.

Inactivating an Overpayment

To inactivate an overpayment entered in error:

Step 1: Type **IO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Press **ENTER**. You'll see the message "Please confirm request to In/activate ('Y' - Yes or 'N' - No)."

Step 4: Type **Y** to confirm. A "Y" will appear in the Inact Flg field, and you'll see the message "Successfully made the Overpayment inactive; Press Enter to Clear."

Step 5: Press **ENTER** once more to clear this message and complete the process of inactivating the overpayment.

The record will be flagged inactive and it will not be reported as an overpayment for prescreening purposes.

Do **not** use this function to indicate that the student has repaid an overpayment or that you have referred the student's overpayment to ED.

Activating an Overpayment

To activate an overpayment that is currently inactive:

Step 1: Type **IO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Press **ENTER**.

Notes:



Aid Overpayment Detail Information

Notes:



To access the *RCON Aid Overpayment Detail Information* screen, you would:

Step 1: Type **OD** on the action bar of the *RCOB Aid Overpayment Update* screen.

Step 2: **TAB** to the desired record and type **S**.

Step 3: Press **ENTER**.

RCON — Organization Contact(OC)	
NSLDS	03-02-1998
Aid Overpayment Detail Information	12:16:10
School Code: 00104600	School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 444444444	Name: ALYCIA P RENE E DOB: 01-17-1968
Disbursement Date....: 09-12-1997	Inactive Flag: (Y=Inactive, Blank=Active)
Overpayment Type.....: PE	Create Date...: 03-01-1998
Overpayment Indicator: Y	Update Date...:
Date Repaid.....:	
Source.....: SCH	
ED Region.....:	
Originating School Information	
School/Branch Code: 00104500	
Name.....: STONEWALL JACKSON STATE JUNIOR COL	
Street Address....:	
City.....: RAINSVILLE	State: AL Zip Code: 35986
PRIVACY ACT OF 1974 (AS AMENDED)	
F3=EXIT	

RCON Aid Overpayment Detail Information

The *RCON Aid Overpayment Detail Information* screen displays all overpayment information and the create date, update date, and inactive flag for the overpayment record selected. This screen also displays the originating school information for the overpayment record selected.

104

CASE STUDIES

Notes:



CASE STUDY 1

SSN: 043 78 6359
Name: Lynn Apostole
DOB: 06-02-1955

The semester has begun and Lynn hasn't received an award letter, so she makes an appointment to see her financial aid counselor. After reviewing the file, her financial aid counselor explains to Lynn that she can't get any Title IV aid because she defaulted on a previously awarded NDSL. Lynn explains that she has made satisfactory repayment arrangements for that loan.

1. Did Lynn make satisfactory repayment arrangements?
2. Which school provided the status of the NDSL?

CASE STUDY 2

SSN: 043 86 5256
Name: Roger Cruver
DOB: 01-02-1958

Roger visits the financial aid office because his SAR states that he is not eligible to receive federal student financial aid due to a default on a loan. Roger admits that he defaulted on several loans, but explains that he consolidated the loans; therefore, he should be eligible to receive federal student financial aid.

1. Does NSLDS show that Roger consolidated any of his Title IV loans?
2. Are any of Roger's loans in default? Is Roger eligible to receive a Title IV loan?

105

CASE STUDY 3

SSN: 043 70 3123
Name: Mona Lee Kij
DOB: 01-31-1950

Mona Lee Kij is a returning student. She attended your school 15 years ago. Mona Lee has married twice and has attended two other schools prior to returning to your school.

Did Mona Lee receive federal student financial aid using her maiden or married names?

Notes:

**CASE STUDY 4**

SSN: 043 86 4791
Name: Joanne Smith
DOB: 11-09-1961

Joanne wants to consolidate her undergraduate and graduate school loans. To complete the consolidation loan application, Joanne has to list each loan she has received. She knows that she has both subsidized and unsubsidized loans. In addition to the amount of each loan she received, Joanne would like to know the outstanding balance of each subsidized and unsubsidized loan.

1. *What amounts did Joanne borrow for each subsidized loan, and what are the outstanding balances?*
2. *What amounts did Joanne borrow for each unsubsidized loan, and what are the outstanding balances?*

CASE STUDY 5

You will be given the identifiers for a "dummy" student in the NSLDS Training Database. Use the Aid Overpayment function to:

1. Find whether the student has existing overpayments.
2. Add a Pell overpayment.
3. Inactivate the Pell overpayment.
4. Activate the Pell overpayment again.
5. Enter data to show that the Pell overpayment has been repaid.

Notes:

**CASE STUDY 6**

Make up the identifiers for a "dummy" student to add to the NSLDS Training Database. Use the Aid Overpayment function to:

1. Add the new student to NSLDS.
2. Add a Perkins overpayment for this student.
3. Enter data to show that the student has made satisfactory arrangements to repay the Perkins overpayment.



ANSWER KEY

Notes:



CASE STUDY 1

Q1. Did Lynn make satisfactory repayment arrangements?

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen, then type **5** and press **ENTER** to access the *Financial Aid Transcript Summary Part 1* screen.

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the screen.

Step 3: Look at the *Loan Sat. Repayment* field to see if there is a "Y" (yes) or "N" (no). There is a "Y."

A1. Yes, Lynn made satisfactory repayment arrangements.

Q2. Which school provided the status of the NDSL?

Step 1: While still at the populated *RC05 Financial Aid Transcript Summary Part 1* screen, type **LD** on the action bar and press **ENTER** to access the *RC06 Loan Detail* screen.

Step 2: Press **F8** to view more loan detail information until you see the *NDSL*. Notice that the *Status Code* for this loan is **DX** (Defaulted, Six Consecutive Payments), so that this loan's status would not prevent Lynn from receiving Title IV aid.

108

Step 3: Type **GS** on the action bar, **TAB** to the selection bar for the NDSL, then type **S** and press **ENTER**. This displays the *RC07 GA/School Information* screen.

Notes:



A2. Hesser College provided the status of the NDSL.

CASE STUDY 2

Q1. Does NSLDS show that Roger consolidated any of his Title IV loans?

Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (This is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Look at the *Aggregate Detail* section of the *Part 1* screen to see if there is a loan amount listed on the *Consolidated Loans* row.

A1. No, according to NSLDS, Roger didn't consolidate any of his loans, because there is no amount entered in the Consolidated Loans section of the Financial Aid Transcript Summary Part 1 screen.

Q2. Are any of Roger's loans in default? Is Roger eligible to receive a Title IV loan?

Notes:



Step 1: To check on the status of Roger's individual loans, type **LD** on the action bar of the *Financial Aid Transcript Summary Part 1* screen and press **ENTER**. This brings you to the *RC06 Loan Detail* screen.

Step 2: Look at the status codes of the loans, pressing **F8** as necessary to view the other loans. Most of the loans have a "DU" (Defaulted, Unresolved) status code.

A2. According to NSLDS, Roger is in default on several Title IV loans, so he is not eligible to receive a Title IV loan.

Roger may have consolidated his defaulted loans, and NSLDS may not yet have received the updated information. If Roger can document that his loans have been consolidated, the FAA may disburse aid based on that documentation even if NSLDS has not yet been updated.

When NSLDS is updated, the "DU" loan status codes will change to "PC" (Paid in Full Through Consolidation Loan).

CASE STUDY 3

Q. Did Mona Lee receive federal student financial aid using her maiden or married names?

Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (Again, this is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Check to see if there is a "Y" in the *Name Hist* field.

Step 4: Type **NH** on the action bar and press **ENTER** to view the *RC08 Name History* screen.

A. Mona Lee received financial aid using the following names:

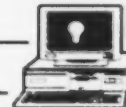
- *Mona Lee Kij*
- *Mona Palladino*
- *MonaLee Chropufka*

Notes:



CASE STUDY 4

Notes:



Q1. What amounts did Joanne borrow for each subsidized loan, and what are the outstanding balances?

Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (Again, this is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Type **AD** on the action bar.

Step 4: In the *Aggregate Detail* section of the screen, click the mouse to position the cursor next to *Subsidized Loans*. Type **S** and press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen with subsidized loans displayed.

A1. Joanne borrowed the following subsidized loans:

<i>Loan Type</i>	<i>Amt.</i>	<i>Outstanding Bal.</i>
<i>FFEL Stafford</i>	<i>\$8,500</i>	<i>\$2,125</i>
<i>FFEL Stafford</i>	<i>\$7,590</i>	<i>\$7,590</i>
<i>FFEL Stafford</i>	<i>\$5,733</i>	<i>\$5,043</i>
<i>FFEL Stafford</i>	<i>\$2,767</i>	<i>\$2,767</i>
<i>FFEL Stafford</i>	<i>\$1,500</i>	<i>\$1,500</i>
<i>FFEL Stafford</i>	<i>\$4,000</i>	<i>\$4,000</i>
<i>FFEL Stafford</i>	<i>\$3,900</i>	<i>\$3,900</i>
<i>FFEL Stafford</i>	<i>\$2,625</i>	<i>\$2,625</i>
<i>FFEL Stafford</i>	<i>\$2,625</i>	<i>\$2,625</i>

Q2. What amounts did Joanne borrow for each unsubsidized loan, and what are the outstanding balances?

Notes:



Step 1: Press **F3** until you reach the populated *RC05 Financial Aid Transcript Summary Part 1* screen.

Step 2: Type **AD** on the action bar.

Step 3: In the Aggregate Detail section of the screen, click the mouse to position the cursor next to Unsubsidized Loans. Type **S** and press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen with unsubsidized loans displayed.

A2. Joanne borrowed these unsubsidized loans:

<i>Loan Type</i>	<i>Amt.</i>	<i>Outstanding Bal.</i>
<i>FFEL Stafford Unsub</i>	<i>\$5,043</i>	<i>\$5,043</i>
<i>Supplem. Loan-SLS</i>	<i>\$2,200</i>	<i>\$2,200</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,800</i>	<i>\$1,800</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,500</i>	<i>\$1,500</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,100</i>	<i>\$1,100</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,925</i>	<i>\$1,925</i>

CASE STUDY 5

See pages Seven-30 through Seven-43 for model procedures and screens relevant to this case study.

CASE STUDY 6

See pages Seven-30 through Seven-43 for model procedures and screens relevant to this case study.

Notes:





Borrower Tracking

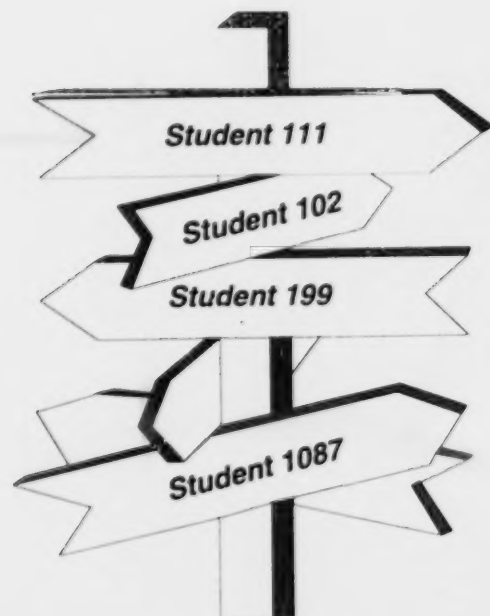
Objectives

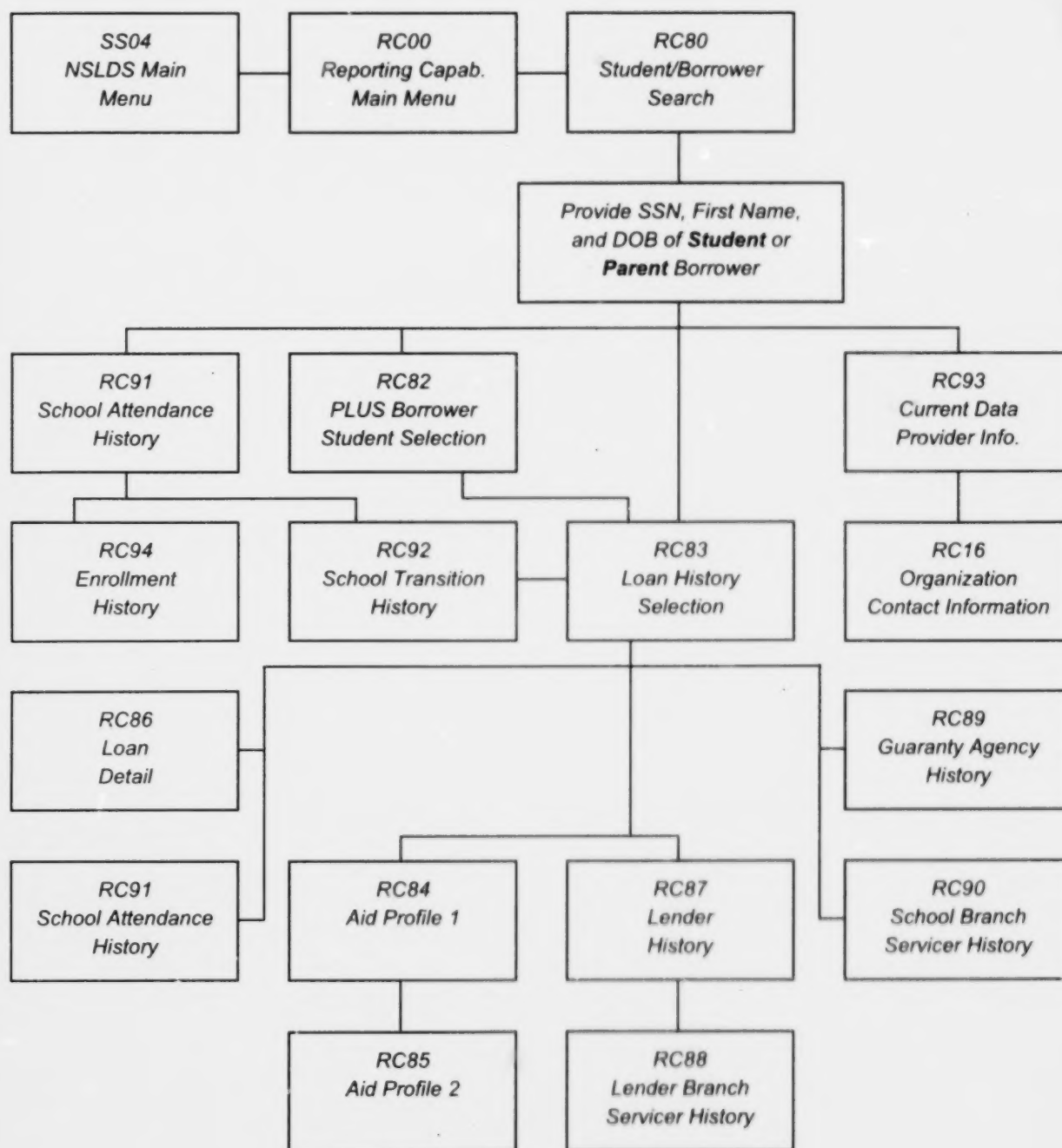
After completing this session, you will be able to:

- ◆ navigate through NSLDS's borrower tracking screens, and
- ◆ use the information on these screens.

Contents

- ◆ Student Borrowers
- ◆ PLUS Loan Borrowers
- ◆ Case Studies





Map of NSLDS's Borrower Tracking Function

Introduction

Borrower tracking helps schools obtain a full history of a borrower's loans. You can review the student's loan status and the date that the status changed, as well as principal and interest amounts. If you need to determine which lender or agency originated or serviced the loan, you can also obtain that information from borrower tracking.

- ♦ All of the screens are **view only**, so you can't change any information on the screens.
- ♦ Any information contained on these screens is protected under the Privacy Act.

Online Screen Navigation

The previous page shows a "map" of the screens included in NSLDS's Borrower Tracking function. Please pull out this page for reference during the rest of the session.

Notes:



Student/Borrower Search

Here's how you access the first borrower tracking screen (*Student/Borrower Search*):

Step 1: At the *SS04 NSLDS Main Menu* screen, type **2** (*Reporting Capabilities Main Menu*) and press **ENTER**.

Step 2: At the *RC00 Reporting Capabilities Main Menu*, type **4** (*Borrower Tracking Security*) and press **ENTER**.

This brings you to the *RC80 Student/Borrower Search* screen.

Notes:



SS04

NSLDS 03-16-1998
NSLDS Main Menu 09:08:10

Input the number of your choice and press ENTER.

- ☒ 2. 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS 03-16-1998
Reporting Capabilities Main Menu 09:08:11

F3

Input the number of your choice and press ENTER.

- ☒ 4. 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security

RC80 — curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
Plus borrower Student selection(PS)

NSLDS 03-16-1998
Student/Borrower Search 09:08:12

F3

SSN.. _____ First Name.. _____ DOB.. __-__-__ (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

NAME HISTORY
Sel First M Last . DOB State Curr SSN

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC80 Student/Borrower Search

You will use the following function keys to navigate through the borrower tracking screens:

- F3** return to previous higher level screen
- F7** scroll back one screen
- F8** scroll forward one screen
- F12** return to *RC80 Student/Borrower Search* screen

To populate the *RC80 Student/Borrower Search* screen:

- Step 1: **TAB** to the SSN field and type the student/borrower's SSN. As an example, use **043 86 5160**. The cursor automatically advances to the First Name prompt.
- Step 2: Type the **first name**. As an example, use **Gregory**. Press **TAB** to advance to the next prompt, DOB (Date of Birth).
- Step 3: Type the **DOB** in MM-DD-CCYY format. As an example, use **11-01-1971**. Do *not* type the hyphens—they are already there.
- Step 4: The cursor automatically advances to the next prompt—PLUS Borrower/Student. The default option, **S** for student, is displayed, so just press **ENTER**.

Notes:




```
RC80  _  curr Data Provider info(DP)  LOan hist(LO)  Attendance Hist(AH)
      Plus borrower Student selection(PS)
```

```
              NSLDS                      03-16-1998
      Student/Borrower Search           09:08:13
```

```
SSN.. 043865160  First Name.. GREGORY____  DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S
```

NAME HISTORY

MORE:

```
Sel First      M Last      DOB      State  Curr SSN
  _ GREGORY    T COLLINS   11-01-1971    043865160
```

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

RC80 Student/Borrower Search

The RC80 Student/Borrower Search screen provides a name history for the student, if available. In addition, the state of residence of the borrower is provided to aid in locating the borrower. This screen allows access to all the other screens and data search functions within borrower tracking.

Here are the action codes you can type on the action bar to view different borrower tracking screens.

DP takes you to the RC93 Current Data Provider Information screen.

LO takes you to the RC83 Loan History Selection screen.

AH takes you to the RC91 School Attendance History screen.

PS takes you to the RC82 PLUS Borrower Student Selection screen, which displays information on parent borrowers associated with students.

STUDENT BORROWERS

Notes:



Current Data Provider Information

To access the RC93 Current Data Provider Information screen:

Step 1: Type **DP** on the action bar in the RC80 Student/Borrower Search screen.

Step 2: **TAB** to Name History and type **S** next to the name history record you want to see.

Step 3: Press **ENTER**.

RC80 ☒ DP curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
Plus borrower Student selection(PS)

NSLDS 03-16-1998
Student/Borrower Search 09:08:13

SSN.. 043865160 First Name.. GREGORY___ DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

NAME HISTORY

MORE:

Sel	First	M Last	DOB	State	Curr SSN
☒	GREGORY	T COLLINS	11-01-1971		043865160

RC93 __ Organization Contact(OC)

NSLDS 03-16-1998
Current Data Provider Information 09:08:15

F3= Student/Borrower Name: GREGORY T COLLINS SSN: 043865160
MORE:

_ GA Code..... 725 Name: AMERICAN STUDENT ASSISTANCE
Street Address..... 330 STUART STREET
City..... BOSTON State: MA Zip Code: 021165292
Resp Begin Date.... 09-04-1991

_ School/Branch Code.: 00214600 Name: EMERSON COLLEGE
Street Address..... 100 BEACON STREET
City..... BOSTON State: MA Zip Code: 02116

Name:

Street Address.....
City..... State: Zip Code:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

Navigation Schematic for RC93 Current Data Provider Information

22

The *RC93 Current Data Provider Information* screen displays guaranty agency (GA)/ school names and addresses in date specific order. GA information is displayed first, followed by school information. GA information is listed if a student has FFEL loans. School information is listed only if the student has campus-based loans. The "Responsible Begin Date" is the date that the data provider is responsible for the loan.

Notes:



Loan History

To access the *RC83 Loan History Selection* screen:

Step 1: Press **F3** from the *RC93 Current Data Provider Information* screen to return to the *RC80 Student/Borrower Search* screen.

On the *Student/Borrower Search* screen, the Name History section shows that this student has used only one name. Since there is only one choice in the Sel column, you don't need to type **S** to select it—the system will choose it by default.

Step 2: Type **LO** on the action bar and press **ENTER**. This brings you to the *RC83 Loan History Selection* screen.

RC80 ☐ LO curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
Plus borrower Student selection(PS)

NSLDS 03-16-1998
Student/Borrower Search 09:08:13

SSN.. 043865160 First Name.. GREGORY___ DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

NAME HISTORY

MORE:

Sel First M Last DOB State Curr SSN
☐ GREGORY T COLLINS 11-01-1971 043865160

RC83 ___ Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
Guar agency Hist(GH) Attendance Hist(AH) School servicer Hist(SH)

NSLDS 03-16-1998
Loan History Selection 09:08:17

F3=E

Student Name: GREGORY T COLLINS SSN: 043865160
PLUS Name...: LESLIE J BENKOVIC SSN: 052727808
Current School/Branch Code: 00214600
Current School Name.....: EMERSON COLLEGE
City.....: BOSTON State: MA

Sel	Type	Loan	Certification/ Guaranty Date	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: +
								Originating School/Branch
-	SU		01-26-1995	09-12-1994	05-02-1995	5000	RP	00214600
-	SF		09-22-1994	09-12-1994	05-02-1995	5500	RP	00214600
-	SL		12-03-1993	09-13-1993	05-03-1994	4000	RP	00214600
-	SF		11-03-1993	09-13-1993	05-03-1994	3500	RP	00214600
-	PU		10-04-1993	09-13-1993	05-03-1994	1000	PF	00214600
-	SF		10-23-1992	09-14-1992	05-06-1993	2625	RP	00214600
-	PU		10-05-1992	09-14-1992	05-03-1993	1000	PF	00214600

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

Navigation Schematic for RC83 Loan History Selection

The RC83 Loan History Selection screen displays the following information:

- ◆ current school,
- ◆ loan type,
- ◆ certification/guaranty date,
- ◆ loan period begin and end dates,
- ◆ loan amount,

- ♦ current loan status, and
- ♦ originating school/branch.

Notes: _____



If there is a "+" in the MORE field, this means there are additional loans. Press F8 to view them.

RC83	—	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)		
		Guar agency Hist(GH)	Attendance His(AH)	School servicer His(SH)		
NSLDS				03-16-1998		
Loan History Selection				09:08:18		
Student Name: GREGORY		T COLLINS		SSN: 043865160		
PLUS Name...: LESLIE		J BENKOVIC		SSN: 052727808		
Current School/Branch Code: 00214600						
Current School Name.....: EMERSON COLLEGE						
City.....: BOSTON			State: MA			
	Loan	Certification/	Period	Period	Curr	MORE: -
Sel	Type	Guaranty Date	Begin Date	End Date	Loan	Originating
-	PL	09-29-1992	09-14-1992	05-06-1993	Amount	Status
					4000	RP
-	SF	09-04-1991	09-04-1991	05-31-1992	2625	RP
						00993600
PRIVACY ACT OF 1974 (AS AMENDED)						
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN						

RC83 Loan History Selection (Showing "MORE" Information)

Notice that there is now a "-" sign in the MORE field, reminding you that there are loans on a previous screen. Press F7 to view the previous screen.

A list of loan type codes is provided on the next page.

A list of loan status codes is provided on page 13.

Loan Program	Loan Type Codes	Definition
FFEL	CL	Consolidation
	PL	PLUS
	SF	Stafford Subsidized
	SL	Federal SLS
	SU	Stafford Unsubsidized
	SN	Stafford Non-Subsidized
FDLP	D1	Direct Stafford Subsidized
	D2	Direct Stafford Unsubsidized
	D4	Direct PLUS
	D5	Direct Consolidation Unsubsidized
	D6	Direct Consolidation Subsidized
	D7	Direct Consolidation PLUS
FISL	FI	Federally Insured Student Loan
	RF	Refinanced
Perkins	DU	National Defense Student Loan
	EU	Perkins Expanded Lending Option
	IC	Income Contingent Loan
	NU	National Direct Student Loan
	PU	Perkins Loan

Loan Type Codes

Status Code	Description
AE	Assigned to U.S. Department of Education
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Cancelled
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DO	Defaulted, Then Bankrupt, Active, Other
DP	Defaulted, Paid In Full
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-Off
DX	Defaulted, Six Consecutive Payments
FB	Forbearance
ID	In School or Grace Period
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
RF	Refinanced
RP	In Repayment
UI	Unreinsured

Loan Status Codes

Aid Profile 1

Aid profile information is displayed on two screens—RC84 Aid Profile 1 and RC85 Aid Profile 2.

To view the RC84 Aid Profile 1 screen:

Step 1: Type **A1** on the action bar of the RC83 Loan History Selection screen.

Step 2: Type **S** next to the loan record you want to select for viewing.
As an example, select "SU."

Step 3: Press **ENTER**. This brings you to the RC84 Aid Profile 1 screen.

The RC84 Aid Profile 1 screen displays:

- ◆ school branch,
- ◆ school branch servicer,
- ◆ loan period begin and end dates,
- ◆ certification/guaranty date,
- ◆ outstanding principal balance and date,
- ◆ outstanding interest balance and date, and
- ◆ current lender branch and servicer.

Notes:



RC83 ☒ A1 Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
 Guar agency Hist(GH) Attendance His(AM) School servicer His(SH)

NSLDS 03-16-1998
 Loan History Selection 09:08:19

Student Name: GREGORY T COLLINS SSN: 043865160
 PLUS Name...: LESLIE J BENKOVIC SSN: 052727808
 Current School/Branch Code: 00214600
 Current School Name.....: EMERSON COLLEGE
 City.....: BOSTON State: MA

Sel	Type	Guaranty Date	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: + Originating School/Branch
☒	SU	01-26-1995	09-12-1994	05-02-1995	5000	RP	00214600

RC84 — Aid profile 2(A2) Loan Detail(LD) Guaranty agency His(GH)
 Lender History(LH) School servicer His(SH) Loan history(LO)

NSLDS 03-16-1998
 Aid Profile 1 09:08:20

F3=E
 Student Name: GREGORY T COLLINS SSN: 043865160
 PLUS Name...: LESLIE J BENKOVIC SSN: 052727808
 School/Branch Code: 00214600 School Status:
 School Name.: EMERSON COLLEGE
 Address.....: 100 BEACON STREET
 BOSTON MA 02116
 School Branch Servicer Code:
 Loan Period Begin Date.....: 09-12-1994 Loan Period End Date.: 05-02-1995
 Certification/Guaranty Date: 01-26-1995 Loan Amount: 5000 Loan Type: SU
 Outstanding Principal Bal.: 5000 Outstanding Principal Bal Date: 01-26-1995
 Outstanding Interest Bal...: Outstanding Interest Bal Date.: 01-26-1995
 Current Lender/Br: 829988 0000 Name: NELLIE MAE - TREASURER
 Lender Branch Address: 50 BRAINTREE HILL PARK SUITE 300
 BRAINTREE MA 021840000 Phone: 6178491325
 Current Lender Branch Servicer:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F12=RETURN

Navigation Schematic for RC84 Aid Profile 1

Aid Profile 2

Notes: _____



To view the RC85 Aid Profile 2 screen:

Step 1: Type **A2** on the action bar of the
RC84 Aid Profile 1 screen.

Step 2: Press **ENTER**.

RC85	Loan Detail(LD)	Lender History(LH)	Guaranty agency His(GH)
	Loan history(LO)		
	NSLDS		03-16-1998
	Aid Profile 2		09:08:21
Student Name: GREGORY	T COLLINS	SSN: 043865160	
PLUS Name...: LESLIE	J BENKOVIC	SSN: 052727808	
Originating Lender: 813478	Name: LOWELL FIVE CENT SAVINGS BANK		
Address.....: 34 JOHN STREET			
LOWELL	MA 018520000	Phone: 5084521300	
Current Guaranty Agency: 725	Name: AMERICAN STUDENT ASSISTANCE		
Address.....: 330 STUART STREET			
BOSTON	MA 021165292		
Originating Guar Agency: 725	Name: AMERICAN STUDENT ASSISTANCE		
Address.....: 330 STUART STREET			
BOSTON	MA 021165292		
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F12=RETURN			

RC85 Aid Profile 2

The RC85 Aid Profile 2 screen is an extension
of the Aid Profile 1 screen.

- ◆ This screen displays the originating lender and current and originating guaranty agency information.
- ◆ You can access this screen only from the Aid Profile 1 screen.

130

Loan Detail

Notes: _____



To access the *RC86 Loan Detail* screen from the *RC85 Aid Profile 2* screen:

Step 1: Type **LD** on the action bar.

Step 2: Press **ENTER**.

RC86 — Aid profile 1(A1) Lender History(LH) Guaranty agency History(GH)
School servicer History(SH) Loan history(LO)

NSLDS 03-16-1998
Loan Detail 09:08:22

Student Name: GREGORY T COLLINS SSN: 043865160
PLUS Name...: LESLIE J BENKOVIC SSN: 052727808
Loan Type: SU Amount: 5000 Certification/Guaranty Date...: 01-26-1995
Period Begin Date....: 09-12-1994 Period End Date.....: 05-02-1995

Outstanding Principal Bal: 5000 Outstanding Principal Bal Date: 01-26-1995
Outstanding Interest Bal.: Outstanding Interest Bal Date.: 01-26-1995

MORE:

-- Disbursement --		-- Cancellation --		---- Refund ----		---- Status ----	
Date	Amount	Date	Amount	Date	Amount	Date	Code
01-26-1995	5000					11-04-1995	RP
						01-26-1995	ID

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC86 Loan Detail

The *RC86 Loan Detail* screen displays the current loan status as well as financial details. It is useful in determining the dates and amounts associated with loan disbursement, cancellation, and refund.

Lender History

Notes: _____



To see which lender currently holds this loan: _____

Step 1: Type **LH** on the action bar of the
RC86 Loan Detail screen. _____Step 2: Press **ENTER**. _____

RC87	Aid profile 1(A1)	Loan Detail(LD)	Lender Br serv his(LB)
	Guar agency His(GH)	Loan history(LO)	
NSLDS		03-16-1998	
Lender History		09:08:23	
Student Name: GREGORY	T COLLINS	SSN: 043865160	
PLUS Name...: LESLIE	J BENKOVIC	SSN: 052727808	
Loan Type: SU	Amount: 5000	Certification/Guaranty Date...: 01-26-1995	
Period Begin Date....: 09-12-1994	Period End Date.....: 05-02-1995	MORE:	
Sel			
- Lender Code...: 829988 Lender Branch Code: 0000 Phone Number: 6178491325			
Lender Name...: NELLIE MAE - TREASURER			
Street Address: 50 BRAINTREE HILL PARK SUITE 300			
City.....: BRAINTREE		State: MA	Zip Code: 021840000
Responsible Begin Date: 02-25-1995		Responsible End Date: 12-31-9999	
- Lender Code...: 813478 Lender Branch Code: 0000 Phone Number: 5084521300			
Lender Name...: LOWELL FIVE CENT SAVINGS BANK			
Street Address: 34 JOHN STREET			
City.....: LOWELL		State: MA	Zip Code: 018520000
Responsible Begin Date: 01-26-1995		Responsible End Date: 02-24-1995	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

RC87 Lender History

The RC87 Lender History screen displays: _____

- ◆ lender code, _____
- ◆ lender branch code, _____
- ◆ lender name and address, _____
- ◆ telephone number, and _____
- ◆ responsible begin and end dates. _____

132

Lender Branch Servicer History

Notes:



To access the RC88 Lender Branch Servicer History screen from the RC87 Lender History screen:

Step 1: Type **LB** on the action bar.

Step 2: Type **S** next to the record you want to select for viewing. As an example, select the first record.

Step 3: Press **ENTER**.

RC87	☒ LB	Aid profile 1(A1)	Loan Detail(LD)	Lender Br serv his(LB)
		Guar agency His(GH)	LOan history(LO)	
NSLDS			03-16-1998	
Lender History			09:08:24	
Student Name: GREGORY		T COLLINS		SSN: 043865160
PLUS Name...: LESLIE		J BENKOVIC		SSN: 052727808
Loan Type: SU		Amount: 5000	Certification/Guaranty Date...: 01-26-1995	
Period Begin Date...: 09-12-1994		Period End Date...: 05-02-1995		
Sel		MORE:		
☒ S	Lender Code...: 829988 Lender Branch Code: 0000 Phone Number: 6178491325			
	Lender Name...: NELLIE MAE - TREASURER			
	Street Address: 50 BRAINTREE HILL PARK SUITE 300			
	City...: BRAINTREE	State: MA	Zip Code: 021840000	
	Responsible Begin Date: 02-25-1995		Responsible End Date: 12-31-9999	
	Lender Code...: 813478	Lender Branch Code: 0000	Phone Number: 5084521300	
	Lender Name...: LOWELL FIVE CENT SAVINGS BANK			
	Street Address: 34 JOHN STREET			
	City...: LOWELL	State: MA	Zip Code: 018520000	
	Responsible Begin Date: 01-26-1995		Responsible End Date: 02-24-1995	
PRIVACY ACT OF 1974 (AS AMENDED)				
RC866-I: No Lender Branch Servicer History for the loan				
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN				

**RC87 Lender History Screen Showing
"No Lender Branch Servicer History" Message**

Notice the message "No Lender Branch Servicer History for the loan" at the bottom of the screen. This means that there is no branch for the lender.

Guaranty Agency History

Notes: _____



To view information on the guaranty agencies that have guaranteed this loan:

Step 1: Type **GH** on the action bar of the *RC87 Lender History* screen.

Step 2: Type **S** next to the desired lender. As an example, type **S** next to the first available choice.

Step 3: Press **ENTER**.

RC89	—	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)
		LOan history(LO)		
			NSLDS	03-16-1998
			Guaranty Agency History	09:08:26
Student Name:	GREGORY	T COLLINS	SSN:	043865160
PLUS Name...	LESLIE	J BENKOVIC	SSN:	052727808
Loan Type:	SU	Amount: 5000	Certification/Guaranty Date...	01-26-1995
Period Begin Date....	09-12-1994	Period End Date.....	05-02-1995	
GA Code:	725	GA Name:	AMERICAN STUDENT ASSISTANCE	
GA Street Address.....	330 STUART STREET			
City.....	BOSTON	State:	MA	Zip Code: 021165292
Responsible Begin Date:	01-26-1995			
GA Code:		GA Name:		
GA Street Address.....				
City.....		State:		Zip Code:
Responsible Begin Date:				
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN				

RC89 Guaranty Agency History

The screen shows the following guaranty agency information for the specific loan record selected, in date order:

- ◆ guaranty agency name,
- ◆ address, and
- ◆ responsible begin date

School Branch Servicer History

Notes: _____



From the RC89 Guaranty Agency History screen:

Step 1: Press **F3** to return to the RC83 Loan History Selection screen.

Step 2: Type **SH** on the action bar.

Step 3: **TAB** to the desired loan record and type **S**. As an example, select the first loan of type "PU" (Perkins).

Step 4: Press **ENTER**.

If there is no school branch servicer, a message will appear at the bottom of the RC83 Loan History Selection screen.

RC83	☒ SH	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)			
		Guar agency Hist(GH)	Attendance His(AH)	School servicer His(SH)			
NSLDS				03-16-1998			
Loan History Selection				09:08:27			
Student Name: GREGORY		T COLLINS		SSN: 043865160			
PLUS Name...: LESLIE		J BENKOVIC		SSN: 052727808			
Current School/Branch Code: 00214600							
Current School Name.....: EMERSON COLLEGE							
City.....: BOSTON State: MA							
				Cur	MORE: *		
	Loan	Certification/	Period	Period	Loan	Originating	
Sel	Type	Guaranty Date	Begin Date	End Date	Amount	Status	School/Branch
-	SU	01-26-1995	09-12-1994	05-02-1995	5000	RP	00214600
-	SF	09-22-1994	09-12-1994	05-02-1995	5500	RP	00214600
-	SL	12-03-1993	09-13-1993	05-03-1994	4000	RP	00214600
-	SF	11-03-1993	09-13-1993	05-03-1994	3500	RP	00214600
☒	PU	10-04-1993	09-13-1993	05-03-1994	1000	PF	00214600
-	SF	10-23-1992	09-14-1992	05-06-1993	2625	RP	00214600
-	PU	10-05-1992	09-14-1992	05-03-1993	1000	PF	00214600
PRIVACY ACT OF 1974 (AS AMENDED)							
RC862-I: No School Branch Servicer History for the loan							
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN							

**RC83 Loan History Selection Screen Showing
"No School Branch Servicer History" Message**

If there is a school branch servicer, the RC90 School Branch Servicer History screen will display. (See the example below.)

Notes:



RC90	Aid profile 1(A1)	Loan Detail(LD)	LOan history(LO)
		NSLDS	03-16-1998
		School Branch Servicer History	09:08:28
Student Name: CHRIS W LAMBART		SSN: 037000002	
PLUS Name....		SSN:	
Sch/Br Code.: 00165600	Name: CHICAGO COLLEGE OF CHIROPODY		
City..... CHICAGO	State: IL	Zip Code: 60600	
Loan type..... PU Amount: 3500		Certification Date: 08-25-1994	
Period Begin date: 09-01-1982		Period End date...: 05-31-1983	
MORE: +			
School Servicer Code: 001002		Name: SCHOOL SERVICER OF FLORIDA COLLEGE AT TAMPA	
Street Address: 1906 ORCHARD WAY			
City: TAMPA	State: FL	Zip Code: 190000001	
Responsible Begin date...: 03-01-1994		Responsible End Date: 01-01-1992	
School Servicer Code: 001001		Name: SERVICER FOR FLORIDA COLLEGES	
Street Address: 123 HICKORY STREET			
City: MIAMI	State: FL	Zip Code: 480960001	
Responsible Begin date...: 03-01-1995		Responsible End Date: 12-31-9999	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

RC90 School Branch Servicer History

The RC90 School Branch Servicer History screen displays the following data in chronological order for a selected Perkins Loan:

- ◆ school/branch code and name,
- ◆ school/branch address,
- ◆ loan type and amount,
- ◆ certification date,
- ◆ period begin and end dates,
- ◆ school servicer code and name,
- ◆ school servicer address, and
- ◆ school servicer responsible begin and end dates.

136

School Attendance History

Notes: _____



To view school attendance history data: _____

Step 1: On the RC83 *Loan History Selection* screen, type **AH** on the action bar. _____

Step 2: Press **ENTER**. _____

```

RC91  —  Transition History(TH)  Plus borrower Student selection(PS)
          LOan history(LO)      Enrollment History(EH)
-----
                                NSLDS                      03-16-1998
                                School Attendance History    09:08:29

Student Name: GREGORY          T COLLINS                      SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC                     SSN: 052727808
Sel  Make a Selection(S) for Transition History OR Enrollment History  MORE:
- School/Branch Code: 00214600  Type/Control: C
  Name: EMERSON COLLEGE
  Street Address: 100 BEACON STREET
  City: BOSTON                State: MA                Zip Code: 02116

- School/Branch Code: 00993600  Type/Control: B
  Name: MIDDLESEX COMMUNITY COLLEGE
  Street Address: SPRINGS ROAD
  City: BEDFORD                State: MA                Zip Code: 017309124

School/Branch Code:           Type/Control:
Name:
Street Address:
City:                          State:                Zip Code:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
  
```

RC91 School Attendance History

The *School Attendance History* screen displays the schools at which the student has received aid or an in-school deferment. This screen is useful in contacting a school where the student has received aid. Also, if the school has sent enrollment history data to NSLDS via the SSCR process, information about the school will be displayed on this screen.

School Transition History

Notes:



To find out if a school has operated under a different name:

Step 1: From the *RC91 School Attendance History* screen, type **TH** on the action bar.

Step 2: **TAB** to the desired selection and type **S**. As an example, select the first available choice.

Step 3: Press **ENTER**.

A message will appear at the bottom of the *RC91 School Attendance History* screen if the school has not operated under another name.

RC91	TH	Transition History (TH) Plus borrower Student selection (PS)	
		LOan history (LO) Enrollment History (EH)	
		NSLDS	03-16-1998
		School Attendance History	09:08:30
Student Name: GREGORY		T COLLINS	SSN: 043865160
PLUS Name...: LESLIE		J BENKOVIC	SSN: 052727808
Sel Make a Selection (S) for Transition History OR Enrollment History MORE:			
S	School/Branch Code: 00214600 Type/Control: C		
Name: EMERSON COLLEGE			
Street Address: 100 BEACON STREET			
City: BOSTON		State: MA	Zip Code: 02116
_ School/Branch Code: 00993600		Type/Control: B	
Name: MIDDLESEX COMMUNITY COLLEGE			
Street Address: SPRINGS ROAD			
City: BEDFORD		State: MA	Zip Code: 017309124
School/Branch Code:		Type/Control:	
Name:			
Street Address:			
City:		State:	Zip Code:
PRIVACY ACT OF 1974 (AS AMENDED)			
RC901-I: No Transition History exists for this School			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

**RC91 School Attendance History Screen Showing
"No School Transition History" Message**

138

If a school has operated under another name, the RC92 School Transition History screen will display. (See the example below.)

Notes: _____



```

RC92  _  LOan history(LO)
-----
                                NSLDS                      03-16-1998
                                School Transition History    09:08:31

Student Name:   CHRIS           W LAMBART                SSN: 037000002
PLUS Name...:

Old School/Branch Code: 00152600
Name:  SAINT LEO COLLEGE

Please make a selection(S) for School Transition History and press ENTER
-----New School -----MORE:
Sel   Code   Name                                     Date
-     00148400 UNIVERSITY OF FLORIDA AT MADISON          01-01-1996
-     00148400 MADISON COMMUNITY COLLEGE                01-01-1993
-     00148400 MADISON SCHOOL OF COSMETOLOGY            01-01-1990

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
  
```

RC92 School Transition History

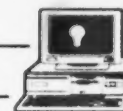
The RC92 School Transition History screen displays a listing of the selected school's name changes, including:

- ◆ previous school/branch code,
- ◆ previous school name, and
- ◆ start date for each new school/branch code and name.

Access to school transition history information is available only from the RC91 School Attendance History screen.

Enrollment History

Notes: _____



To access a student's enrollment history: _____

Step 1: From the *RC91 School Attendance History* screen, type **EH** on the action bar.

Step 2: **TAB** to the school you wish to select and type **S**. As an example, select the first available choice.

Step 3: Press **ENTER**.

RC94		
NSLDS		03-16-1998
Enrollment History		09:08:32
Student Name: GREGORY	T COLLINS	SSN: 043865160
PLUS Name...: LESLIE	J BENKOVIC	SSN: 052727808
School/Branch Code: 00214600		
Name.....: EMERSON COLLEGE		
Enrollment		MORE:
Code	Description	Effective Date
G	GRADUATED	12-31-1995
F	FULL TIME	09-22-1994
PRIVACY ACT OF 1974 (AS AMENDED)		
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN		

RC94 Enrollment History

The *RC94 Enrollment History* screen displays a student's enrollment history at a given school, with the following information:

- ◆ school/branch code,
- ◆ school name,
- ◆ enrollment codes,
- ◆ description of enrollment codes, and
- ◆ effective dates.

PLUS LOAN BORROWERS

Press **F3** until you reach the *RC00 Reporting Capabilities Main Menu*. Then type **4** (*Borrower Tracking Security*) and press **ENTER**. This is the best way to obtain an unpopulated *RC80 Student/Borrower Search* screen.

PLUS Borrower Student Selection

You can access a parent's loan information two ways: with student or parent data.

Method 1—Using Student Data

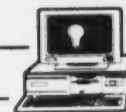
Step 1: **TAB** to the SSN field on the *RC80 Student/Borrower Search* screen and type the *student's SSN, first name*, and **DOB**. As an example, use the following data:

- ◆ SSN: 043 90 1308
- ◆ First Name: Jennifer
- ◆ DOB: 11-17-1972

Step 2: In the PLUS Borrower (P)/Student(S) field, the **S** (for Student) is already present, so just press **ENTER** to populate the screen for this student.

Step 3: Type **PS** on the action bar and press **ENTER** to display the *RC82 PLUS Borrower Student Selection* screen.

Notes:



RC82 Loan History(LO) Attendance History(AH)			
NSLDS		03-16-1998	
PLUS Borrower Student Selection		09:08:33	
Student			
First Name: JENNIFER	Middle Initial: S	SSN: 043901308	State:
Last Name: ALVARADO		DOB: 11-17-1972	
PLUS Borrowers Associated with Student MORE:			
Sel First	M Last	DOB	State SSN
— SUZANNE	M MORRIS	07-23-1941	NH 053646721
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

**RC82 PLUS Borrower Student Selection Screen
Accessed Using Student Identification Data**

Method 2—Using Parent Data

Press **F3** until you reach the *RC00 Reporting Capabilities Main Menu*. Then type **4** (*Borrower Tracking Security*) and press **ENTER**. This is the best way to obtain an unpopulated *RC80 Student/Borrower Search* screen.

Step 1: **TAB** to the SSN field on the *RC80 Student/Borrower Search* screen and type the *parent's SSN, first name, and DOB*. As an example, use the following data:

- ◆ SSN: 053 64 6721
- ◆ First Name: Suzanne
- ◆ DOB: 07-23-1941

Step 2: In the PLUS Borrower (P)/Student(S) field, type **P** (for Parent) and press **ENTER** to populate the screen for this parent PLUS borrower.

Step 3: Type **PS** on the action bar and press **ENTER** to display the *RC82 PLUS Borrower Student Selection* screen.

142

RC82 — Loan History (LO) Attendance History (AH)

NSLDS
PLUS Borrower Student Selection

03-16-1998

09:08:34

PLUS Borrower

First Name: SUZANNE

Middle Initial: M SSN: 053646721 State:

Last Name.: MORRIS

DOB: 07-23-1941

Students Associated with PLUS Borrower

MORE:

Sel First

M Last

DOB

State SSN

- JENNIFER

S ALVARADO

11-17-1972

043901308

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC82 PLUS Borrower Student Selection Screen
Accessed Using Parent Identification Data

The RC82 PLUS Borrower Student Selection screen allows you to view all students associated with a PLUS borrower or all PLUS borrowers associated with a student, depending on whether you entered **parent** or **student** identification data on screen RC80.

IMPORTANT NOTE: Now that you have accessed the RC82 PLUS Borrower Student Selection screen, the other screens you display will be **limited to data on PLUS loans and parent borrowing.**

- ◆ For example, you are next going to access the RC83 Loan History Selection screen.
- ◆ When you viewed this screen earlier in this session, it displayed data only on **student** loans.
- ◆ However, when you now access the same screen, it will display data only on **PLUS loans and parent borrowing.**

Loan History (PLUS Borrower)

Notes: _____



To access loan history information: _____

Step 1: From the RC82 PLUS Borrower
Student Selection screen, type **LO** on
the action bar.

Step 2: Press **ENTER**.

RC83	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)
	Guar agency Hist(GH)	Attendance His(AH)	School servicer His(SH)

NSLDS		03-16-1998
Loan History Selection		09:08:35

Student Name: JENNIFER	S ALVARADO	SSN: 043901308
PLUS Name...: SUZANNE	M MORRIS	SSN: 053646721
Current School/Branch Code: 00257500		
Current School Name.....: FRANKLIN PIERCE COLLEGE		
City.....: RINDGE	State: NH	

Loan Sel	Certification/Type	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: Originating School/Branch
-	PL	08-05-1993	09-08-1993	05-17-1994	3090 RP	00257500
-	PL	08-05-1992	09-09-1992	05-18-1993	4000 RP	00257500
-	PL	01-21-1992	09-09-1991	05-17-1992	4000 RP	00257500

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC83 Loan History Selection (PLUS Borrower)

The *RC83 Loan History Selection* screen provides a summary of all the loans associated with a specific PLUS borrower. It will also identify any consolidated loans.

This screen displays:

- ◆ loan type,
- ◆ certification/guaranty date,
- ◆ loan period begin and end dates,
- ◆ loan amount,
- ◆ current loan status, and
- ◆ originating school/branch.

Notes:



Loan Detail (PLUS Borrower)

Notes:



To access loan detail information:

Step 1: From the *RC83 Loan History Selection* screen, type **LD** on the action bar.

Step 2: **TAB** to the desired loan record and type **S**. As an example, type **S** next to the first loan of type "PL."

Step 3: Press **ENTER**.

The *RC86 Loan Detail* screen displays the current loan status as well as other details.

RC83 ☐ LD Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
 Guar agency Hist(GH) Attendance His(AH) School servicer His(SH)

NSLDS 03-16-1998
 Loan History Selection 09:08:36

Student Name: JENNIFER S ALVARADO SSN: 043901308
 PLUS Name...: SUZANNE M MORRIS SSN: 053646721
 Current School/Branch Code: 00257500
 Current School Name.....: FRANKLIN PIERCE COLLEGE
 City.....: RINDGE State: NH

Sel	Type	Guaranty Date	Period Begin Date	Period End Date	Amount	Status	School/Branch
☒	PL	08-05-1993	09-08-1993	05-17-1994	3090	RP	00257500

RC86 — Aid profile 1(A1) Lender History(LH) Guaranty agency History(GH)
 School servicer History(SH) Loan history(LO)

NSLDS 03-16-1998
 Loan Detail 09:08:37

F3=EXIT Student Name: JENNIFER S ALVARADO SSN: 043901308
 PLUS Name...: SUZANNE M MORRIS SSN: 053646721
 Loan Type: PL Amount: 3090 Certification/Guaranty Date: 08-05-1993
 Period Begin Date....: 09-08-1993 Period End Date.....: 05-17-1994

Outstanding Principal Bal: 1797 Outstanding Principal Bal Date: 06-30-1996
 Outstanding Interest Bal.: 11 Outstanding Interest Bal Date.: 06-30-1996

MORE:
 -- Disbursement -- -- Cancellation -- ---- Refund ---- ---- Status ----
 Date Amount Date Amount Date Amount Date Code
 08-16-1993 3090 08-16-1993 RP

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

Navigation Schematic for RC86 Loan Detail (PLUS Borrower)

Lender History (PLUS Borrower)

Notes:



To access lender history:

Step 1: From the RC86 Loan Detail screen,
type LH on the action bar.

Step 2: Press ENTER to display the RC87
Lender History screen.

```

RC87  _ Aid profile 1(A1)   Loan Detail(LD)   Lender Br serv his(LB)
      Guar agency His(GH) LOan history(LO)

                                NSLDS                                03-16-1998
                                Lender History                        09:08:38

Student Name: JENNIFER        S ALVARADO                      SSN: 043901308
PLUS Name...: SUZANNE        M MORRIS                      SSN: 053646721

Loan Type: PL Amount: 3090      Certification/Guaranty Date...: 08-05-1993
Period Begin Date...: 09-08-1993 Period End Date...: 05-17-1994
Sel MORE:
- Lender Code...: 829988 Lender Branch Code: 0000 Phone Number: 6178491325
  Lender Name...: NELLIE MAE - TREASURER
  Street Address: 50 BRAINTREE HILL PARK SUITE 300
  City...: BRAINTREE State: MA Zip Code: 021840000
  Responsible Begin Date: 10-15-1995 Responsible End Date: 12-31-9999
- Lender Code...: 813843 Lender Branch Code: 0000 Phone Number: 6037884769
  Lender Name...: PEOPLES BANK OF LITTON
  Street Address: 3 MAIN STREET
  City...: LITTLETON State: NH Zip Code: 035610000
  Responsible Begin Date: 08-05-1993 Responsible End Date: 10-14-1995

```

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC87 Lender History (PLUS Borrower)

This screen provides a summary of all the
lenders associated with a specific loan as
well as information about the lender
currently holding the loan and the lender's
address.

148

Guaranty Agency History (PLUS Borrower)

Notes: _____



To access guaranty agency information:

Step 1: At the RC87 Lender History screen, type **GH** on the action bar.Step 2: **TAB** to the desired lender code and type **S**. As an example, type **S** next to the first lender code choice.Step 3: Press **ENTER**.

```

RC89  _ Aid profile 1(A1)  Loan Detail(LD)  Lender History(LH)
      Loan history(LO)

                                NSLDS                      03-16-1998
                                Guaranty Agency History      09:08:40

Student Name: JENNIFER          S ALVARADO                  SSN: 043901308
PLUS Name.... SUZANNE          M MORRIS                   SSN: 053646721

Loan Type: PL  Amount: 3090      Certification/Guaranty Date... 08-05-1993
Period Begin Date..... 09-08-1993  Period End Date..... 05-17-1994

GA Code: 733  GA Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.
GA Street Address..... P.O. BOX 877
City..... CONCORD                      State: NH  Zip Code: 033020000
Responsible Begin Date: 08-05-1993

GA Code:      GA Name:
GA Street Address.....
City.....
Responsible Begin Date:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

RC89 Guaranty Agency History (PLUS Borrower)

Aid Profile 1 (PLUS Borrower)

Notes:



There are two aid profile screens—RC84 Aid Profile 1 and RC85 Aid Profile 2.

The Aid Profile 1 screen provides a summary of the parent's selected loan, as well as the current loan servicer.

To access RC84 Aid Profile 1:

Step 1: From the RC89 Guaranty Agency History screen, type **A1** on the action bar.

Step 2: Press **ENTER**.

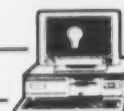
RC84	Aid profile 2(A2)	Loan Detail(LD)	Guaranty agency His(GH)
	Lender History(LH)	School servicer His(SH)	Loan history(LO)
NSLDS		03-16-1998	
Aid Profile 1		09:08:41	
Student Name:	JENNIFER S ALVARADO	SSN:	043901308
PLUS Name...	SUZANNE M MORRIS	SSN:	053646721
School/Branch Code:	00257500	School Status:	
School Name..	FRANKLIN PIERCE COLLEGE		
Address.....	COLLEGE ROAD		
	RINDGE	NH	03461
School Branch Servicer Code:			
Loan Period Begin Date.....	09-08-1993	Loan Period End Date..	05-17-1994
Certification/Guaranty Date:	08-05-1993	Loan Amount:	3090
Outstanding Principal Bal...	1797	Outstanding Principal Bal Date:	06-30-1996
Outstanding Interest Bal...	11	Outstanding Interest Bal Date..	06-30-1996
Current Lender/Br:	829988 0000	Name:	NELLIE MAE - TREASURER
Lender Branch Address:	50 BRAINTREE HILL PARK SUITE 300		
	BRAINTREE	MA	021840000
Current Lender Branch Servicer:	700043	Phone:	6178491325
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F12=RETURN			

RC84 Aid Profile 1 (PLUS Borrower)

150

Aid Profile 2 (PLUS Borrower)

Notes: _____

To access the *Aid Profile 2* screen:

Step 1: From the *RC84 Aid Profile 1* screen,
type **A2** on the action bar.

Step 2: Press **ENTER**.

RC85	Loan Detail (LD)	Lender History (LH)	Guaranty agency His (GH)
	Loan history (LO)		
NSLDS		03-16-1998	
Aid Profile 2		09:08:42	
Student Name: JENNIFER	S ALVARADO	SSN: 043901308	
PLUS Name...: SUZANNE	M MORRIS	SSN: 053646721	
Originating Lender: 813843		Name: PEOPLES BANK OF LITTON	
Address.....: 3 MAIN STREET			
LITTLETON		NH 035610000	Phone: 6037884769
Current Guaranty Agency: 733		Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.	
Address.....: P.O. BOX 877			
CONCORD		NH 033020000	
Originating Guar Agency: 733		Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.	
Address.....: P.O. BOX 877			
CONCORD		NH 033020000	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F12=RETURN			

RC85 Aid Profile 2 (PLUS Borrower)

The *RC85 Aid Profile 2* screen identifies the
originating lender, current guaranty agency,
and original guaranty agency.

School Branch Servicer History (PLUS Borrower)

This screen can be accessed from the RC83 *Loan History Selection* screen exactly as for student borrowers.

- ◆ School branch servicer history information only applies to Perkins Loans.

School Attendance History (PLUS Borrower)

This screen can be accessed from the RC83 *Loan History Selection* screen exactly as for student borrowers.

- ◆ The information refers to the school the student was to attend when the parent applied for the PLUS loan.
- ◆ This does not mean that the parent attended this school.

School Transition History (PLUS Borrower)

This screen can be accessed from the RC91 *School Attendance History* screen exactly as for student borrowers.

Enrollment History (PLUS Borrower)

This screen can be accessed from the RC91 *School Attendance History* screen exactly as for student borrowers.

- ◆ The screen displays a student's enrollment status at a given school, not the parent's enrollment status.

Notes:



CASE STUDIES

Notes:

**CASE STUDY 1***Student*

SSN: 043 90 0123

Name: Ian D. Sclar

DOB: 09-17-1975

Parent

SSN: 044 70 3105

Name: Brian D. McDonald

DOB: 04-06-1952

Ian attends the University of New Hampshire. He received financial aid; however, it did not cover his cost of attendance. Ian's father decides to borrow a PLUS loan to cover the remaining expenses. He wants to use the same lender he borrowed from previously, but doesn't remember the name of the lender.

What amount did Ian's father previously borrow and what is the name of the lender?

CASE STUDY 2

SSN: 043 86 8545
Name: James S. Cruz
DOB: 01-21-1973

James attends the University of California - Santa Barbara. Since James is graduating this year, he schedules an appointment to do an exit interview. At the exit interview, James is given a printout from his guaranty agency listing all his loans.

While reviewing the printout, James notices two loans that shouldn't be listed. As far as James knows, these loans were cancelled. James makes an appointment with his financial aid counselor concerning this matter. You are his financial aid counselor.

Were two of James' loans cancelled? If so, what were the amounts, and when were the loans cancelled?

Notes:



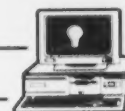
CASE STUDY 3

SSN: 043 84 8930
Name: Edward L. Ravelo
DOB: 08-03-1963

Edward L. Ravelo attends Newbury College. He has submitted two loan applications to the financial aid office. The information on the applications is the same except for the name—Edward wrote a different last name on each loan application.

Has Edward received loans under different names?

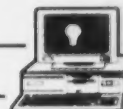
Notes:





ANSWER KEY

Notes:



CASE STUDY 1

Q. What amount did Ian's father previously borrow and what is the name of the lender?

Method 1—Using Student Data

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the **SSN** field and key in the *student's SSN, First Name, and DOB*. In the **PLUS Borrower(P)/ Student(S)** field, the **S** (for Student) is already present, so just press **ENTER** to populate the **RC80 Student/Borrower Search** screen.

Step 3: Type **PS** on the action bar and press **ENTER** to access the **RC82 PLUS Borrower Student Selection** screen.

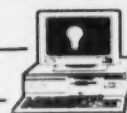
Step 4: Type **LO** on the action bar and press **ENTER** to access the **RC83 Loan History Selection** screen.

Step 5: Type **LH** on the action bar and press **ENTER** to access the **RC87 Lender History** screen.

A. Ian's father borrowed \$3,550. The lender was New Hampshire Higher Ed Loan Corp.

Method 2—Using Parent Data

Notes:



Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the SSN field and key in the *parent's SSN, First Name, and DOB*. In the PLUS Borrower(P)/Student(S) field, type **P** (for PLUS Borrower) and then press **ENTER** to populate the *RC80 Student/Borrower Search* screen.

Step 3: Type **PS** on the action bar and press **ENTER** to access the *RC82 PLUS Borrower Student Selection* screen.

Step 4: Type **LO** on the action bar and press **ENTER** to access the *RC83 Loan History Selection* screen.

Step 5: Type **LH** on the action bar and press **ENTER** to access the *RC87 Lender History* screen.

A. Ian's father borrowed \$3,550. The lender was New Hampshire Higher Ed Loan Corp.

CASE STUDY 2

Q. Were two of James' loans cancelled? If so, what were the amounts, and when were the loans cancelled?

Notes:



Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the **SSN** field and key in the student's **SSN**, **First Name**, and **DOB**. In the **PLUS Borrower(P)/Student(S)** field, the **S** (for Student) is already present, so just press **ENTER** to populate the **RC80 Student/Borrower Search** screen.

Step 3: On the populated *Student/Borrower Search* screen, notice that James has received aid under another last name—"Mattei." To check the loans he received under that name, type **LO** on the action bar, type **S** on the selection bar for "James S. Mattei," and press **ENTER**. This brings you to the *RC83 Loan History Selection* screen.

Step 4: None of the loans on the first *Loan History Selection* screen has a Current Loan Status of CA (Cancelled). However, there is a "+" in the **MORE** field, so press **F8** to view more loans. On the second screen, two loans have the CA code.

Step 5: To view more information about the first cancelled loan, type **LD** on the action bar of the *RC83 Loan History Selection* screen, type **S** on the selection bar for the first cancelled loan record, and press **ENTER**. This brings you to the *RC86 Loan Detail* screen for the first cancelled loan.

158

Step 6: Press **F3** to return to the **RC83 Loan History Selection** screen and repeat step 5 for the other cancelled loan.

Notes:



A. Two loans were cancelled for James:

- **A Federal Stafford Loan (Loan Type SF) for \$3,500 was cancelled on 10/18/94.**
- **An Unsubsidized Stafford Loan (Loan Type SU) for \$4,000 was cancelled on 10/19/94.**

CASE STUDY 3

Q. Has Edward received loans under different names?

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the **SSN** field and key in the student's **SSN**, **First Name**, and **DOB**. In the **PLUS Borrower(P)/Student(S)** field, the **S** (for Student) is already present, so just press **ENTER** to populate the **RC80 Student/Borrower Search** screen.

A. Edward has received loans using these two names:

- *Edward L. Ravelo*
- *Edward L. Crockett*

Notes:





Student Status Confirmation Reports

Objectives

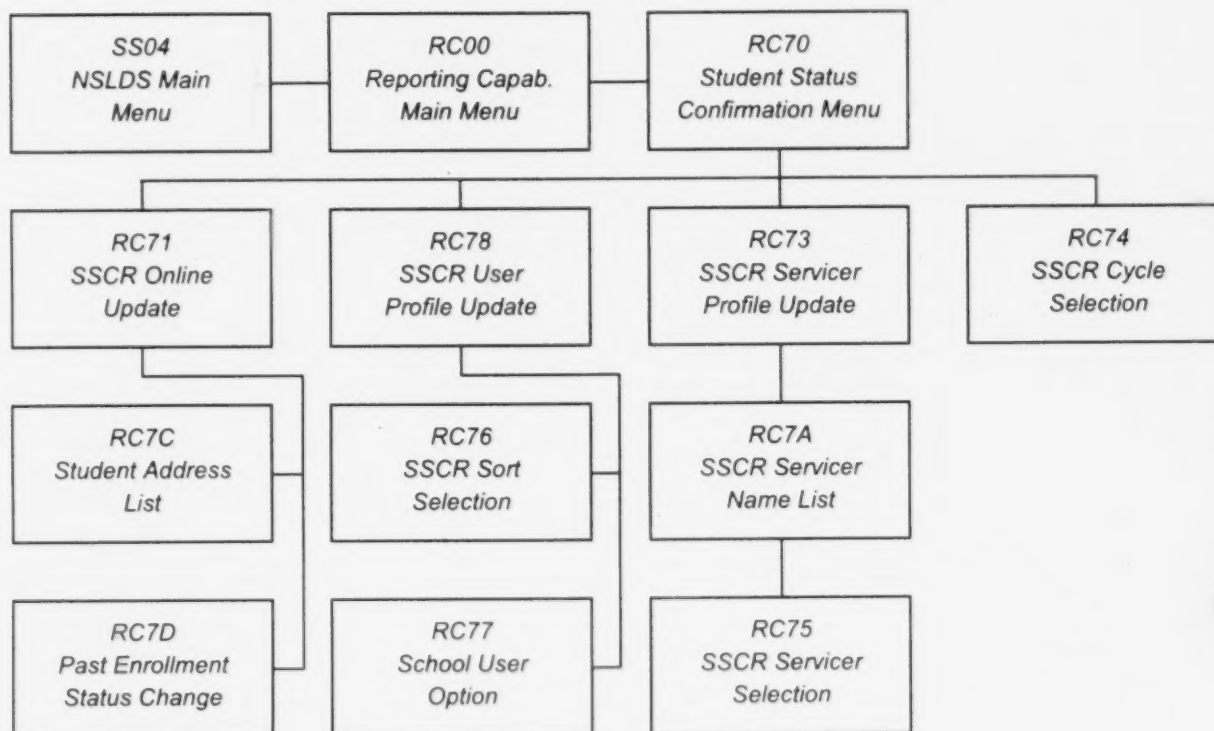
After completing this session, you will be able to:

- ◆ navigate through NSLDS's Student Status Confirmation Report (SSCR) screens, and
- ◆ update SSCR information online.

Contents

- ◆ Student Status Confirmation Update
- ◆ SSCR Cycle Selection
- ◆ Case Studies





Map of NSLDS's Student Status Confirmation Report Function

Introduction

There are two ways to update enrollment information in NSLDS—via batch request and online.

Batch Method: This method allows you to receive a single electronic Student Status Confirmation Report file, fully process it in your computing environment, and transmit the SSCR data back to NSLDS—again as a single file.

Online Method: This method allows you to update the enrollment data directly on the screens provided by NSLDS.

- ◆ When you need to correct a few student records on a previously submitted SSCR, or make an ad hoc report for a change in student status, online updating is appropriate.
- ◆ The EDExpress SSCR module lets you update and build a submittal file on your PC off-line (that is, without being connected to NSLDS) and transmit it using EDconnect.

Online Screen Navigation

The previous page shows a “map” of the screens included in NSLDS’s Student Status Confirmation Report function. Please pull out this page for reference during the rest of the session.

Notes:



Student Status Confirmation Menu

The SSCR function is accessed from the
NSLDS Main Menu as follows:

Step 1: At the SS04 NSLDS Main Menu,
type **2** (*Reporting Capabilities Main
Menu*).

Step 2: Press **ENTER**.

Step 3: At the RC00 Reporting Capabilities
Main Menu, type **6** (*Student Status
Confirmation Menu*).

Step 4: Press **ENTER**.

Notes:



SS04

NSLDS 03-17-1998
NSLDS Main Menu 12:15:47

Input the number of your choice and press ENTER.

☒ 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS 03-17-1998
Reporting Capabilities Main Menu 12:15:48

Input the number of your choice and press ENTER.

☒ 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security
5. Financial Aid Transcript Summary
6. Student Status Confirmation Menu

RC70

NSLDS 03-17-1998
Student Status Confirmation Menu 12:15:49

Input the number of your choice and press ENTER.

1. Student Status Confirmation Update
2. SSCR User Profile Update
3. SSCR Servicer Profile Update
4. SSCR Cycle Selection

F3=EXIT

Navigation Schematic for RC70 Student Status Confirmation Menu

The RC70 Student Status Confirmation Menu screen gives you four options:

1. Student Status Confirmation Update
2. SSCR User Profile Update
3. SSCR Servicer Profile Update
4. SSCR Cycle Selection

STUDENT STATUS CONFIRMATION UPDATE

Notes:



Choose the first option on the menu, *Student Status Confirmation Update*, as follows:

Step 1: Type 1.

Step 2: Press ENTER.

This brings you to the *RC71 SSCR Online Update* screen.

SSCR Online Update

The *RC71 SSCR Online Update* screen is used to view and change SSCR data.

RC71	<u>D</u> Display student(D)	Update sscr(U)	List Address(LA)
	Past enrollment Status change(PS)		
NSLDS		03-17-1998	
SSCR Online Update		12:15:50	
School/Branch Code..: 00104600 TALLADEGA COLLEGE			
SSN..	First Name..	DOB..-_-	(MM-DD-YYYY)
Last Name:		Curr SSN.:	
----- Current Student Status Change (Mandatory) -----			
Anticipated Completion Date..-_- (MM-DD-YYYY)			
Enrollment Code..	Enrollment Code Effect Date....-_-		(MM-DD-YYYY)
	Certification Date.....-_-		(MM-DD-YYYY)
Student Designator.. (Optional)			
---- Student Information Change (Optional) ----			
SSN.....	First Name..	Middle Initial..	
Last Name..		DOB..-_-	(MM-DD-YYYY)
--- Permanent Address Information (Optional)---			
Address line 1..			
Address line 2..			
City.....	State...	Zip Code..	
Country..	Effective Date..-_-		(MM-DD-YYYY)
PRIVACY ACT OF 1974 (AS AMENDED)			
RC004-I: Please enter key fields and press ENTER			
F3=EXIT			

RC71 SSCR Online Update

166

The action codes for the *RC71 SSCR Online Update* screen give you the following options:

- D** allows for display of information for a student identified by his or her SSN, first name, and date of birth.
- U** allows you to update a student's data.
- LA** lists a student's previous addresses.
- PS** allows you to change data on a student's past enrollment status or the dates of a student's past enrollment period.

Notes:



Display Student Information (SSCR Online Update Screen)

Notes:



To populate the RC71 SSCR Online Update screen with a student's information, you would:

Step 1: Type the student's SSN, first name, and DOB.

Step 2: Press ENTER.

RC71	<u>D</u>	Display student(D)	Update sscr(U)	List Address(LA)
Past enrollment Status change(PS)				
NSLDS			03-17-1998	
SSCR Online Update			12:15:51	
School/Branch Code...: 00104600 TALLADEGA COLLEGE				
SSN..043882658 First Name..COREY_____ DOB..12-06-1974 (MM-DD-YYYY)				
Last Name:_____ Curr SSN.:_____				

RC71	<u>U</u>	Display student(D)	Update sscr(U)	List Address(LA)
Past enrollment Status change(PS)				
NSLDS			03-17-1998	
SSCR Online Update			12:15:52	
School/Branch Code...: 00104600 TALLADEGA COLLEGE				
SSN..043882658 First Name..COREY_____ DOB..12-06-1974 (MM-DD-YYYY)				
Last Name: REED Curr SSN.: 043882658				
----- Current Student Status Change (Mandatory) -----				
Anticipated Completion Date...__-__-__ (MM-DD-YYYY)				
Enrollment Code... Enrollment Code Effect Date...__-__-__ (MM-DD-YYYY)				
Certification Date...__-__-__ (MM-DD-YYYY)				
Student Designator... (Optional)				
---- Student Information Change (Optional) ----				
SSN..... First Name..... Middle Initial...				
Last Name..... DOB...__-__-__ (MM-DD-YYYY)				
--- Permanent Address Information (Optional)---				
Address line 1.....				
Address line 2.....				
City..... State... Zip Code.....				
Country..... Effective Date...__-__-__ (MM-DD-YYYY)				
PRIVACY ACT OF 1974 (AS AMENDED)				
RC704-I: Please make changes and press ENTER				
F3=EXIT				

RC71 SSCR Online Update (Populated)

168

On the populated RC71 SSCR Online Update screen:

- ◆ The action bar at the top of the screen automatically displays the U (Update) action code.
- ◆ The cursor automatically advances to the Anticipated Completion Date field.
- ◆ A prompt at the bottom of the screen tells you "Please make changes and press ENTER."

This screen allows you to update the student's enrollment status and related SSCR information. The screen includes:

- ◆ anticipated completion date;
- ◆ enrollment code;
- ◆ enrollment code effective date;
- ◆ certification date;
- ◆ student designator (optional school ID for student);
- ◆ student information—SSN, first name, middle initial, last name, and date of birth; and
- ◆ permanent address data—street address, city, state, zip, country, and effective date.

The table on the next page lists the SSCR enrollment codes.

Notes:



CODES	ENROLLMENT STATUS
A	Approved Leave of Absence
D	Deceased
F	Full Time
G	Graduated
H	Half Time or More, But Less Than Full Time
L	Less Than Half Time
W	Withdrawn
X	Never Attended
Z	No Record Found

SSCR Enrollment Codes

170

Update SSCR Student Information (SSCR Online Update Screen)

Notes:



To update the student's enrollment data, you would:

Step 1: Type the following information in the appropriate fields on the RC71 SSCR Online Update screen:

- ◆ Anticipated Completion Date
- ◆ Enrollment Code
- ◆ Enrollment Code Effective Date
- ◆ Certification Date
- ◆ Student Designator (optional)

Step 2: Press ENTER.

RC71	<u>U</u>	Display student (D)	Update sscr (U)	List Address (LA)
Past enrollment Status change (PS)				
NSLDS			03-17-1998	
SSCR Online Update			12:15:53	
School/Branch Code... 00104600 TALLADEGA COLLEGE				
SSN... 043882658		First Name... COREY	DOB... 12-06-1974 (MM-DD-YYYY)	
Last Name... REED		Curr SSN.: 043882658		
----- Current Student Status Change (Mandatory) -----				
Anticipated Completion Date... 05-24-1998 (MM-DD-YYYY)				
Enrollment Code... F		Enrollment Code Effect Date... 09-05-1997 (MM-DD-YYYY)		
		Certification Date... 03-17-1998 (MM-DD-YYYY)		
Student Designator... 741293		(Optional)		
---- Student Information Change (Optional) ----				
SSN.....		First Name...	Middle Initial...	
Last Name...		DOB... - - - -		(MM-DD-YYYY)
--- Permanent Address Information (Optional) ---				
Address line 1..				
Address line 2..				
City.....		State...	Zip Code...	
Country..		Effective Date... - - - - (MM-DD-YYYY)		
PRIVACY ACT OF 1974 (AS AMENDED)				
AA022-I: Successfully UPDATED				
F3=EXIT				

171

RC71 SSCR Online Update (After Updating Enrollment Information)

To add a new address for a student:

On the RC71 SSCR Online Update screen, to add a new address for a student you would:

Step 1: Type **U** on the action bar.

Step 2: Type the following information in the appropriate fields:

- ◆ Address Lines 1 and 2
- ◆ City
- ◆ State
- ◆ Zip Code
- ◆ Country
- ◆ Effective Date

Step 3: Press **ENTER**.

Notes:



```

RC71      U  Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment Status change(PS)

                               NSLDS                03-17-1998
                               SSCR Online Update    12:15:53

School/Branch Code... 00104600 TALLADEGA COLLEGE
SSN...043882658 First Name..COREY                DOB..12-06-1974 (MM-DD-YYYY)
Last Name: REED                               Curr SSN.: 043882658
----- Current Student Status Change (Mandatory) -----
Anticipated Completion Date..05-24-1998 (MM-DD-YYYY)
Enrollment Code..F Enrollment Code Effect Date....09-05-1997 (MM-DD-YYYY)
Certification Date.....03-17-1998 (MM-DD-YYYY)
Student Designator..741293 (Optional)
----- Student Information Change (Optional) -----
SSN..... First Name.. Middle Initial...
Last Name.. DOB... (MM-DD-YYYY)
--- Permanent Address Information (Optional)---
Address line 1..445 THIRD STREET
Address line 2..
City.....SILVER SPRING State..MD Zip Code..20901
Country..US Effective Date..05-24-1998 (MM-DD-YYYY)
  
```

PRIVACY ACT OF 1974 (AS AMENDED)

AA022-I: Successfully UPDATED

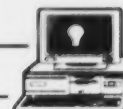
F3=EXIT

173

RC71 SSCR Online Update (After Updating Address Information)

After entering the new address, to review the addresses associated with a student you would:

Notes:



Step 1: Type **LA** on the action bar of the **RC71 SSCR Online Update** screen.

Step 2: Press **ENTER**.

RC7C

NSLDS
Student Address List

03-17-1998
12:15:54

First Name: COREY Last Name: REED SSN: 043882658
Sel Please make a selection(S) and press ENTER MORE:

- Address line 1: 445 THIRD STREET
Address line 2:
City.....: SILVER SPRING State: MD Zip: 20901
Country.....: US Effective Date: 05-24-1998

- Address line 1: 2030 F ST. NW
Address line 2:
City.....: MINNEAPOLIS State: MN Zip: 22563
Country.....: US Effective Date: 09-15-1997

Address line 1:
Address line 2:
City.....: State: Zip:
Country.....: Effective Date:

Address line 1:
Address line 2:
City.....: State: Zip:
Country.....: Effective Date:

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7C Student Address List

To make a previously reported address the "permanent" address:

If the address was previously reported, you can retrieve the previous address from the *RC7C Student Address List* screen and make it the "permanent" address. To do this, you would:

Step 1: **TAB** to the desired address on the *RC7C Student Address List* screen, and type **S** to select it.

Step 2: Press **ENTER**.

The *RC71 SSCR Online Update* screen would redisplay, populated with the address information you selected from the *RC7C Student Address List* screen. The message "Successfully **UPDATED**" would appear, confirming the change.

Notes:



Past Enrollment Status Change

NSLDS stores all enrollment records that your school has submitted. To view the student's past enrollment, you would:

Step 1: Type **PS** on the action bar of the **RC71 SSCR Online Update** screen.

Step 2: Press **ENTER**.

This would bring you to the **RC7D Past Enrollment Status Change** screen.

Notes:



RC7D ___ Add(A) Change(C) Delete(DE)			
NSLDS		03-17-1998	
Past Enrollment Status Change		12:15:55	
Sch/Br Code.: 00104600 TALLADEGA COLLEGE			
Student Name: COREY REED		SSN: 043882658	
Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY)		(MM-DD-YYYY)	
Enrollment Code. __ Effective Date. __-__-__		Cert Date. __-__-__	
----- Current Status -----			
Enroll Code: F Effec Date: 09-05-1997 Cert Date: 09-15-1997 Source: SSCR			
Make a selection(S) and press ENTER for UPDATE or DELETE			
Enroll			
Sel Code	Description	Effec Date	Certi Date
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

RC7D Past Enrollment Status Change

The **RC7D Past Enrollment Status Change** screen allows you to access and make online changes to a student's past enrollment status. You can add, change, and delete data such as:

- ◆ enrollment code,
- ◆ effective date, and
- ◆ certification date.

Past Enrollment Status Change— "Add" Option

The Add option allows you to add online an enrollment period that was not previously reported. To add an enrollment period, you would:

- Step 1. Type **A** on the action bar of the *RC7D Past Enrollment Status Change* screen.
- Step 2. Fill in the **Enrollment Code**, **Effective Date**, and **Certification Date** fields.
- Step 3. Press **ENTER**.

Notes:





As an example, suppose there is an error in the effective date of the sample student's period of less than half time enrollment. To correct the effective date, you would:

Step 1: Type **C** on the action bar.

Step 2: **TAB** past the Enrollment Code field to the Effective Date field and key in the new date.

Step 3: In the Certification Date field, key in today's date.

Step 4: In the Current Status section, type **S** next to the desired choice—the Less Than Half Time record.

Step 5: Press ENTER.

150

Past Enrollment Status Change— "Delete" Option

This option lets you delete an enrollment period previously reported for a student.

As an example, suppose the sample student was not actually enrolled for the 1993-94 academic year. To delete this enrollment period, you would:

Step 1: Type **DE** on the action bar.

Step 2: In the Current Status section, type **S** next to the desired choice—the Less Than Half Time record.

Step 3: Press **ENTER**.

Notes:



132

RC7D **DE** Add(A) Change(C) Delete(DE)

NSLDS 03-17-1998
Past Enrollment Status Change 12:16:02

Sch/Br Code.: 00104600 TALLADEGA COLLEGE
Student Name: COREY REED SSN: 043882658
Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)
Enrollment Code..L Effective Date..09-09-1993 Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F Effec Date: 09-05-1997 Cert Date: 03-17-1998 Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll MORE:
Sel Code Description Effec Date Certi Date
- A APPROVED LEAVE OF ABSENCE 10-01-1996 03-17-1998
S L LESS THAN HALF TIME 09-09-1993 03-17-1998

RC7D Add(A) Change(C) Delete(DE)

NSLDS 03-17-1998
Past Enrollment Status Change 12:16:02

Sch/Br Code.: 00104600 TALLADEGA COLLEGE
Student Name: COREY REED SSN: 043882658
Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)
Enrollment Code..L Effective Date..09-09-1993 Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F Effec Date: 09-05-1997 Cert Date: 03-17-1998 Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll MORE:
Sel Code Description Effec Date Certi Date
- A APPROVED LEAVE OF ABSENCE 10-01-1996 03-17-1998

PRIVACY ACT OF 1974 (AS AMENDED)

AA018-I: Successfully DELETED

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7D Past Enrollment Status Change—Deleting an Enrollment Record

The Less Than Half Time record has been deleted, as shown in the Current Status section. The message "Successfully DELETED" is displayed at the bottom of the screen.

SSCR CYCLE SELECTION

Notes:



To access the SSCR Cycle Selection screen:

Step 1: Press **F3** to return to the *RC70 Student Status Confirmation Menu*.

Step 2: Type **4** (*SSCR Cycle Selection*).

Step 3: Press **ENTER**.

RC70

NSLDS
Student Status Confirmation Menu

03-17-1998
12:16:13

Input the number of your choice and press ENTER.

4 1. Student Status Confirmation Update
 2. SSCR User Profile Update
 3. SSCR Servicer Profile Update
 4. SSCR Cycle Selection

RC74 U Update(U)

NSLDS
SSCR Cycle Selection

03-17-1998
12:16:14

F3- School/Branch Code...: 00104600 TALLADEGA COLLEGE
 Select the School Category

☐ 1. Quarter
☐ 2. Semester
☐ 3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		-
2	FEBRUARY		-
3	MARCH		-
4	APRIL		-
5	MAY		-
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		-
10	OCTOBER		-
11	NOVEMBER		-
12	DECEMBER		-

RC747-I: Select a Category and Update SSCR cycle

F3=EXIT

Navigation Schematic for RC74 SSCR Cycle Selection

184

The SSCR Cycle Selection screen prompts you to "Select a Category and Update SSCR cycle."

Notes:



You must select one of the following School Categories:

1. Quarter
2. Semester
3. Others

The table below shows how many cycles you can select and how far apart they must be.

SCHOOL CATEGORY	CYCLES
Quarter	Minimum of 3 cycles, 1 each regular term (Fall, Winter, and Spring), 3 months apart.
Semester	Minimum of 2 cycles, 1 each term (Fall and Spring), 4 months apart. If 4 or more cycles are selected, they must be 2 months apart.
Others	Minimum of 2 cycles, 4 months apart. If 5 or 6 cycles are selected, they must be 2 months apart.
Default	6 cycles, 1 every even month.

- Notes:
1. No more than 6 cycles may be selected.
 2. For term institutions, a minimum of 1 cycle is required for each term.

Scheduling SSCR Cycles

Notes:



Step 1: Press the **HOME** key to bring the cursor to the action bar and type **U**.

Step 2: **TAB** to the School Category field.

Step 3: Type the number of the School Category. The cursor automatically advances to the Required Indicator column to the right of January.

Step 4: Type **Y** for each desired month, pressing **TAB** to advance to other months.

Step 5: Press **ENTER**.

Your SSCR schedule is updated and a confirmation message "*Successfully UPDATED*" is displayed at the bottom of the screen.

136

RC74 U Update(U)

NSLDS
SSCR Cycle Selection03-17-1998
12:16:15

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
2. Semester
3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		Y
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

RC747-I: Select a Category and Update SSCR cycle

F3= RC74 U Update(U)

NSLDS
SSCR Cycle Selection03-17-1998
12:16:16

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
2. Semester
3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		Y
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

AA022-I: Successfully UPDATED

F3=EXIT

RC74 SSCR Cycle Selection—Scheduling the Desired Months

187

Removing SSCR Cycles

To remove an existing cycle:

Step 1: On the *RC74 SSCR Cycle Selection* screen, check that the appropriate number is already entered in the *School Category* field—in our example, this should be the number “1”.

Step 2: Advance to the month you want to remove by pressing **TAB** or using other methods of moving the cursor.

Step 3: Use the **DELETE** key to delete the **Y** at the March cycle (or type **N** over the **Y**).

Step 4: Press ENTER.

The Y is now removed from the March cycle, and a confirmation message “*Successfully UPDATED*” is displayed at the bottom of the screen.

Notes:



RC74 U Update(U)

NSLDS
SSCR Cycle Selection03-17-1998
12:16:17School/Branch Code... 00104600 TALLADEGA COLLEGE
Select the School Category

- 1. Quarter
- 2. Semester
- 3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		[deleted]
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

RC74 U Update(U)

NSLDS
SSCR Cycle Selection03-17-1998
12:16:18School/Branch Code... 00104600 TALLADEGA COLLEGE
Select the School Category

- 1. Quarter
- 2. Semester
- 3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		-
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

AA022-I: Successfully UPDATED

F3=EXIT

RC74 SSCR Cycle Selection—Removing the March Cycle

CASE STUDIES

Notes:



CASE STUDY 1

You will be given the identifiers for a "duinmy" student in the NSLDS Training Database.

Use the SSCR function to update your student's enrollment information as follows:

- ◆ Anticipated Completion Date:
05-24-1998
- ◆ Enrollment Code: F
- ◆ Enrollment Code Effective Date:
09-05-1997
- ◆ Certification Date: use today's date
- ◆ Student Designator: 741293

CASE STUDY 2

You will be given the identifiers for a "dummy" student in the NSLDS Training Database.

Use the SSCR function to add a new address for your student as follows:

- ◆ 445 Third Street, Silver Spring, MD
20901 US
- ◆ Effective Date: 05-24-1998

100

CASE STUDY 3

You are logged on to the NSLDS Training Database for a specific school, as determined by your NSLDS Logon ID.

1. *Use the SSCR function to specify 6 SSCR cycles for your school, starting in February.*
2. *Use the SSCR function to change to 3 SSCR cycles for your school, starting in January.*

Notes:





ANSWER KEY

CASE STUDY 1

See page Nine-11 for model procedures and screens relevant to this case study.

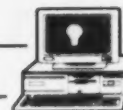
CASE STUDY 2

See pages Nine-12 through Nine-14 for model procedures and screens relevant to this case study.

CASE STUDY 3

See pages Nine-24 through Nine-29 for model procedures and screens relevant to this case study.

Notes:



10

Wrap Up

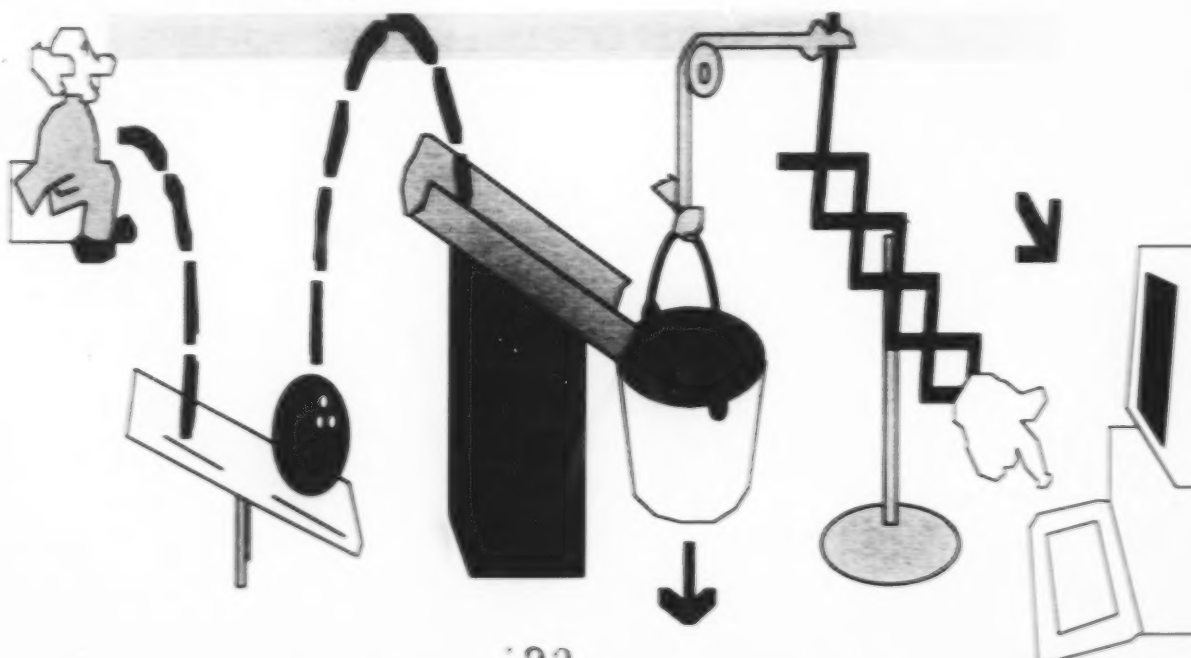
Objectives

By completing this session, you will:

- ♦ provide feedback on improving NSLDS, and
- ♦ provide feedback on improving the workshop.

Contents

- ♦ Wrap Up



WRAP UP

We often mentioned during this workshop that ED is interested in receiving your comments and suggestions for enhancing NSLDS. Throughout the workshop, you've been using the "NSLDS Recommendations Sheet" to jot down your ideas. Please include any other ideas you have now and hand in the sheets.

ED is also interested in your assessment of this workshop. Please complete ED's "Training Assessment Form" beginning on the next page of this Guide. The information you provide will help us make changes to future NSLDS Workshops.

Notes:





U.S. Department of Education
Office of Postsecondary Education
Student Financial Assistance Programs

Form Approved
OMB Number: 1840-0112
Expiration Date: 11/30/99

Training Assessment Form

Title IV Student Financial Assistance Programs

Date: _____ Region: _____ Location: _____

The information collected on this form will be used by Student Financial Assistance Programs to determine the effectiveness of the training and materials provided. Any information you provide will be deemed confidential. You are not required to answer any of the questions on this form. Names will not be published in any compilation of this data.

Identification of Respondent (optional)

Name _____ Position _____

Institution/Agency _____

Type of Institution/College:

Street or P.O. Box # _____

☐ One-year or less ☐ Public
☐ Two- or Three-year ☐ Private nonprofit
☐ Four-year or more ☐ Private proprietary

City _____

State _____ Zip Code _____

Length of time in financial aid related responsibilities: (years/months) _____

Title IV Programs you participate in: ☐ Federal Pell ☐ Federal Direct Loans
☐ Federal Family Educational Loan Programs ☐ Federal Campus-Based Programs

Training Content (Please respond to each of the following questions.)

1. Did the workshop provide information that you can apply to your work? Yes/No If No, why not?

2. Which sessions were the most beneficial to you?

3. Which sessions were the least beneficial to you?

4. How would you suggest the training content be expanded or reduced?

Training Facilities

5. Were you satisfied with the facilities (training room(s), hotel accommodations, location, accessibility, learning environment, etc.)?
Yes/No If No, why not?

Training Materials

6. Check **all** the phrases that describe the training materials, including the overheads:

- | | | |
|--|---|--|
| ☐ Well-organized | ☐ Consistent | ☐ Useful charts and illustrations |
| ☐ Difficult to follow | ☐ Inconsistent | ☐ Not enough charts and illustrations |
| ☐ Clear and concise | ☐ Contributed to my learning | ☐ Relevant case studies and exercises |
| ☐ Too complex | ☐ Not relevant to my job | ☐ Not enough case studies and exercises |
| ☐ Accurate | ☐ Attractive and attention-getting | ☐ Useful for future reference |
| ☐ Inaccurate | ☐ Too detailed | ☐ Other _____ |

Instructors

7. Circle Yes or No for each characteristic.

(Instructor's Name)	Clear Presenter ?		Well-Organized Presenter ?		Knowledgeable About Subject ?		Responsive To Questions ?		(Other Comments)
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	

Comments

8. What suggestions would you offer to improve the workshop/materials? _____

9. What additional training would you like the U. S. Department of Education to provide? _____

10. Other Comments and Suggestions

(Please use this space and the back of this page to elaborate on any of the previous questions, or to make additional comments or suggestions about this training.)

Burden Statement: Public reporting burden for this collection of information is estimated to average five minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, Information Management and Compliance Division, Washington, D.C. 20302-4851, and to the Office of Management and Budget, Paperwork Reduction Project (1845-0112), Washington, D.C. 20503.